

# PeopleSoft 8.9

## Enterprise Learning (Training Administration)

May 29, 2007



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## Setting Up a Session

### Adding a Course Session

PeopleSoft's Training Administration has two components that are the foundation of all actions within the training process. **Courses** and **Sessions**, to some extent, are involved with every action within training administration.

Courses must be established first. A course may have several sessions active concurrently in PeopleSoft, but the sessions may not have identical details, such as time and facility. The date must be unique between sessions.

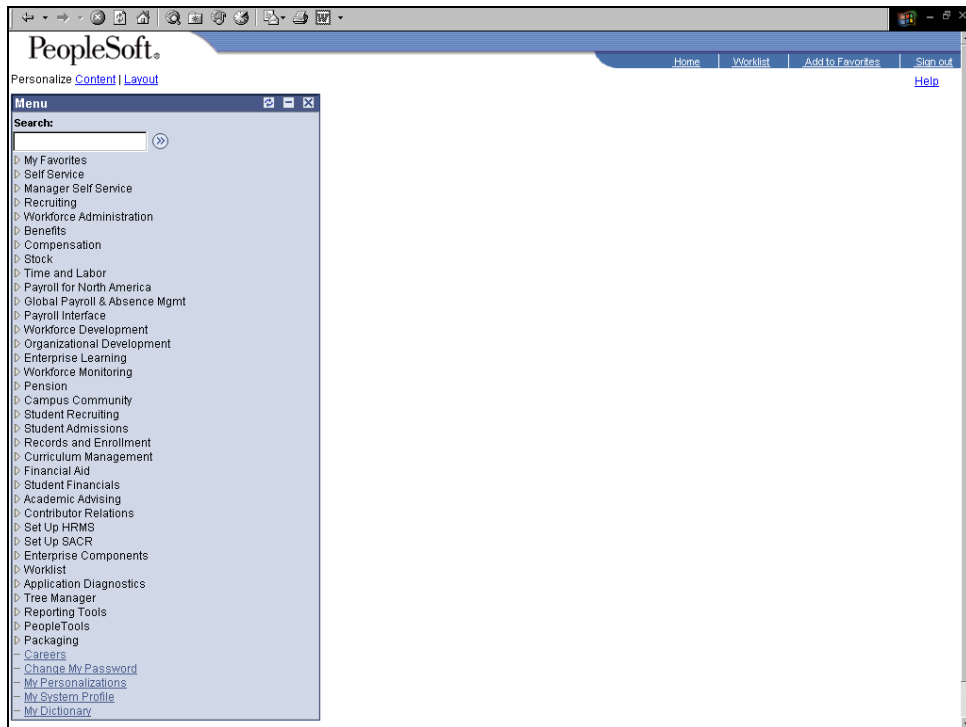
**NOTE: To maintain consistency and avoid duplication, the State Personnel Department maintains the Course Table. Please utilize the Add A Course Form (Appendix A) to request new course codes.**

This topic will explain how to add a session for an existing course. A course session can be set up only if the Course Table has an active entry. If your course has not been entered on the Course Table, contact the State Personnel Department's Training Division.

### Procedure

In this topic, you will add a session for the Presentation Skills course (course code BSK001), and specify the session information in the PeopleSoft Human Resources application.

## Procedure



Step	Action
1.	Begin by navigating to the <b>Course Session Profile</b> page. Click the <b>Enterprise Learning</b> link. <a href="#">Enterprise Learning</a>
2.	Click the <b>Define Course/Cost Details</b> link.
3.	Click the <b>Course Sessions</b> link.

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**Menu**

- Resources
  - Define Course/Cost
    - Details
      - Category/Subcategory
      - Catalog Costs
      - Courses
      - Course Costs
      - Course Session Planner
      - Course Sessions**
        - Course Session Costs
        - Catalog Organization
        - Program Information
        - Tuition Expense Type
        - Steps DEU
        - Plans DEU
    - Define Budget
      - Add a Person
      - Modify a Person
      - Administer Training Requests
  - Workforce Monitoring
  - Pension
  - Campus Community
  - Student Recruiting
  - Student Admissions
  - Records and Enrollment
  - Curriculum Management
  - Financial Aid
  - Student Financials
  - Academic Advising
  - Contributor Relations
  - Set Up HRMS
  - Set Up SACR
  - Enterprise Components
  - Worklist
  - Application Diagnostics
  - Tree Manager
  - Reporting Tools
  - PeopleTools
  - Packaging
  - Careers
  - Change My Password
  - My Personalizations
  - My System Profile
  - My Dictionary

**Course Sessions**

Enter any information you have and click Search. Leave fields blank for a list of all values.

[Find an Existing Value](#) | [Add a New Value](#)

Course Code:  begins with

Course Session Nbr:  begins with

Description:  begins with

Course Start Date:  =

Course End Date:  =

Session Status:  =

☐ Case Sensitive

[Basic Search](#)

[Find an Existing Value](#) | [Add a New Value](#)

Step	Action
4.	Click the <b>Add a New Value</b> tab.

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**Menu**

- Resources
  - Define Course/Cost
    - Details
      - Category/Subcategory
      - Catalog Costs
      - Courses
      - Course Costs
      - Course Session Planner
      - Course Sessions**
      - Course Session Costs
      - Catalog Organization
      - Program Information
      - Tuition Expense Type
      - Steps DEU
      - Plans DEU
  - Define Budget
    - Add a Person
    - Modify a Person
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  - Tree Manager
  - Reporting Tools
  - PeopleTools
  - Packaging
  - Careers
  - Change My Password
  - My Personalizations
  - My System Profile
  - My Dictionary

**Course Sessions**

[Find an Existing Value](#) | [Add a New Value](#)

Course Code:

Course Session Nbr:

[Add](#)

[Find an Existing Value](#) | [Add a New Value](#)

Step	Action
5.	<p>Enter the desired information into the <b>Course Code</b> field. Example: "<b>BSK001</b>".</p> <p>If you do not know the course code, click on the magnifying glass to lookup the course codes.</p>
6.	<p>Click the <b>Add</b> button.</p> <p><b>IMPORTANT:</b> Leave the Course Session Number Blank.</p> <p>The system will assign a sequential number when you save the record.</p> <p><a href="#">Add</a></p>
7.	<p>Use the <b>Course Session Profile</b> page to enter, update, or view a session status, date, time, and capacity.</p>
8.	<p>Specify the session status, such as Active, Canceled, or Complete in the <b>Session Status</b> field.</p> <p>To create a new session, accept the default status of <b>Active</b> for the <b>Session Status</b> field.</p>



### Course Session Profile Page (Fields Descriptions)

**Session Status:** Indicates whether the session is Active, Cancelled, or Complete. An Active value is appropriate for a new session. Otherwise you will not be able to enroll students.

**Session Administration Box:** Must be checked. Do not click in this box. Otherwise you will not be able to complete the scheduling.

**Start/End Date/Times:** (See next **Note Tip** for times and **Reschedule** information.)

**Duration:** The system populates this field from the Course Table. If the session duration is different from this default, update the Duration field.

**Duration Unit Field:** The system populates this field from the Course Table. This is the unit in which the Duration is being measured. If you want to use a different unit, select a Duration Unit from the available options.

**Min. Students/Session:** The system populates this from the Course Table. Update the minimum number of students in this field, if necessary.

**Max. Students/Session:** The system populates this field from the Course Table. Update the maximum number of students in this field, if necessary.

**Language Field:** This field is not used.

**Vendor ID:** Enter your Business Unit in this field, which is used for reporting purposes. If you do not know the number, use the lookup feature and select the appropriate number.



**State/End Dates:** Enter the start and end dates for the course session.

**Start/End Times:** Enter the start and end times of the course session.

**Note:** All times entered are assumed to be AM unless:

1. They are specified in Military Time format, for example **0900** becomes **9:00 am** and **1500** becomes **3:00 pm**.
2. You put a **p** after the time, for example **3p** becomes **3:00 pm** and **4:30p** becomes **4:30 pm**. These will translate after you type them and press the **tab** key.

**Reschedule Check Box:** When entering a new session, leave this box blank.

**Note:** If you later change the Start/End Dates or Start/End Times, you will also need to click inside the Reschedule Box. When you change the dates for the session, the system automatically updates the dates in the Student Training Records of students on the waiting lists and enrolled in the course session. You must check the Reschedule Box to cause the updates to generate.

When you select the Rescheduled Check Box and save the page, the system changes the letter code in the student training record to RSC (rescheduled).



Step	Action
9.	Enter the desired information into the <b>Start Date</b> field. Example: " <b>02/17/2003</b> ".
10.	Press the Tab key. <input type="text" value="02/17/2003"/>
11.	Enter the desired information into the <b>End Date</b> field. Example: " <b>02/17/2004</b> ".  (Note: The fact that the class start/end dates are not the same year appears to be a typo in the tutorial.)
12.	Press the Tab key. <input type="text" value="02/17/2004"/>
13.	Enter the desired information into the <b>Start Time</b> field. Example: " <b>0800</b> ".
14.	Press the Tab key. <input type="text" value="0800"/>
15.	Enter the desired information into the <b>End Time</b> field. Example: " <b>1700</b> ".

The screenshot displays the PeopleSoft Enterprise Learning Test interface. On the left is a navigation menu with categories like 'Resources', 'Define Course/Cost', 'Course Sessions', and 'Workforce Monitoring'. The main content area is titled 'Course Session Profile' and includes tabs for 'Location, Instructor', 'Equipment', and 'Expense'. The 'Location, Instructor' tab is active, showing details for Course BSK001 (Presentation Skills) and Session Number 0000. Fields include 'Session Status' (Active), 'Start/End Dates' (02/17/2003 to 02/17/2004), 'Start/End Times' (8:00AM to 1700), 'Duration' (8.0), 'Duration Unit' (Hour), 'Min Students/Session' (3), and 'Max Students/Session' (12). There are also checkboxes for 'Session Administration' and 'Rescheduled', a 'Vendor ID' field, and buttons for 'Save', 'Notify', 'Add', and 'Update/Display'.

Step	Action
16.	Click the <b>Location, Instructor</b> tab.
17.	Use the <b>Location, Instructor</b> page to enter, update, or view information regarding the course session at the training facility.

The screenshot shows the PeopleSoft Training Guide interface. The left sidebar contains a 'Menu' with various options like 'Define Course/Cost', 'Course Sessions', 'Define Budget', etc. The main content area is titled 'Course Session Profile' and has tabs for 'Location, Instructor', 'Equipment', and 'Expense'. The 'Location, Instructor' tab is active, showing fields for 'Course' (BSK001), 'Course Status' (Active), 'Session #' (0000), and 'Session Status' (Active). Below this, the 'Training Location' section includes 'Start/End Dates' (02/17/2003 to 02/17/2004), 'Start/End Times' (8:00AM to 5:00PM), 'Duration' (8.0), 'Duration Unit' (Hour), 'Facility' (with a search icon), 'Vendor ID' (with a search icon), 'Room Code', 'Building', 'Floor #', and 'Maximum Nbr of Students'. The 'Instructor' section below has a 'Vendor' field with a search icon and a 'Select free Instructor' link. At the bottom, there are 'Save', 'Notify', 'Add', and 'Update/Display' buttons, along with a breadcrumb trail: 'Course Session Profile | Location, Instructor | Equipment | Expense'.

Step	Action
18.	Specify a training facility code for this session in the <b>Facility</b> field. Enter the desired information into the <b>Facility</b> field. Example: " <b>BZ001</b> ".




Add Instructor to the program.

The screenshot shows the PeopleSoft Enterprise Learning Test interface. The 'Course Session Profile' form is displayed with the 'Location, Instructor' tab selected. The form contains the following fields and sections:

- Course Information:** Course: BSK001, Presentation Skills; Course Status: Active; Session #: 0000; Session Status: Active.
- Training Location:** Start/End Dates: 02/17/2003 to 02/17/2004; Start/End Times: 8:00AM to 5:00PM; Duration: 8.0; Duration Unit: Hour; Facility: BZ001; Vendor ID: (empty); Room Code: (empty); Building: (empty); Floor #: (empty).
- Instructor:** Instructor ID: (empty); Name: (empty); Vendor: (empty).

At the bottom of the form, there are buttons for 'Save', 'Notify', 'Add', and 'Update/Display'. The 'Save' button is highlighted in green.

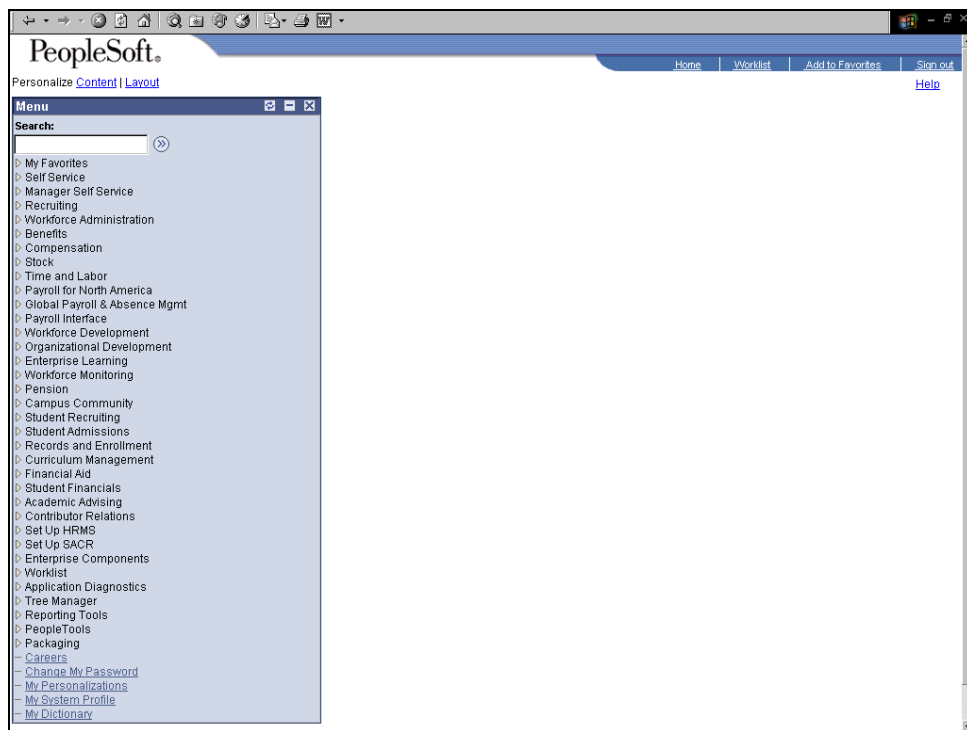
Step	Action
19.	Click the <b>Save</b> button. 
20.	Notice that the session number has changed from <b>0000</b> to <b>0001</b> . This indicates that a session has been added to the Presentation Skills course. It was automatically assigned a number. In this case <b>0001</b> .
21.	You have successfully added a session for the Presentation Skills course. <b>End of Procedure.</b>

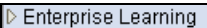

## Adding an Instructor

You need an instructor to lead a course. Instructors can be employees or non-employees. You cannot select instructors unless you specify that they are qualified to lead the course. You use the Instructor table to enter and update instructor information.

In this example, your company has developed a presentation course internally for employees. Luis Duarte, an employee in your company, is selected as the qualified instructor for this course. Your goal is to add Luis Duarte as an instructor into the system.

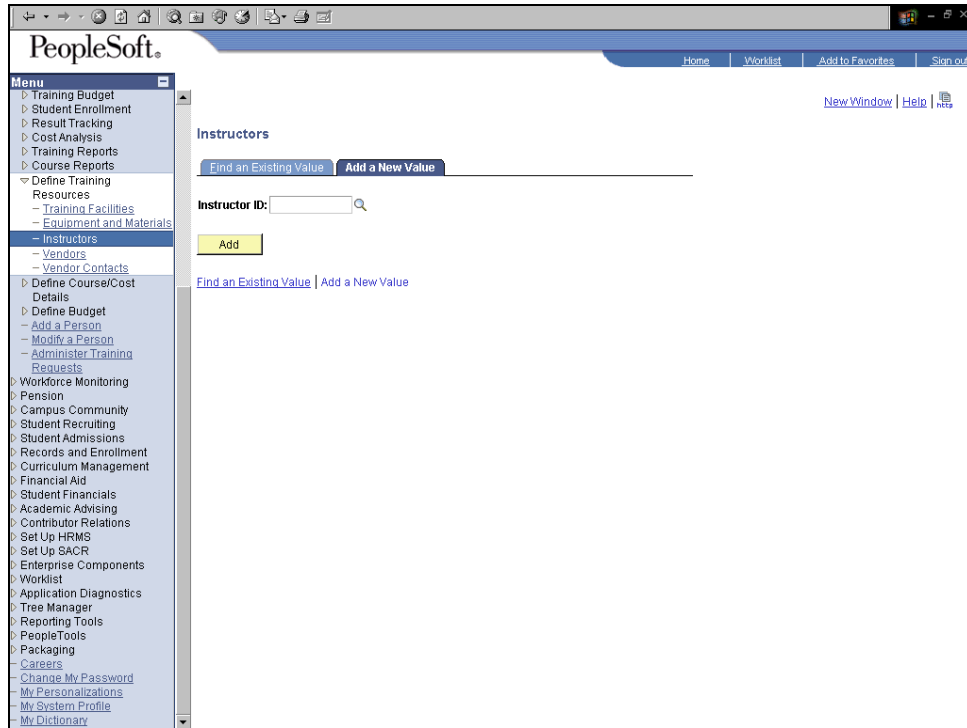
## Procedure



Step	Action
1.	Begin by navigating to the <b>Instructor Profile</b> page. Click the <b>Enterprise Learning</b> link. 
2.	Click the <b>Instructors</b> link under <b>Define Training Resources</b> . 

The screenshot shows the PeopleSoft web interface. On the left is a navigation menu with categories like Training Budget, Student Enrollment, Result Tracking, etc. The 'Instructors' link is highlighted. The main content area is titled 'Instructors' and contains a search form. The form has four input fields: 'Instructor ID', 'Name', 'Alternate Character Name', and 'Last Name'. Each field has a dropdown menu set to 'begins with'. Above the fields are two tabs: 'Find an Existing Value' (selected) and 'Add a New Value'. Below the fields are checkboxes for 'Include History', 'Correct History', and 'Case Sensitive'. At the bottom of the form are buttons for 'Search', 'Clear', 'Basic Search', and 'Save Search Criteria'. There are also links for 'Find an Existing Value' and 'Add a New Value' below the buttons.

Step	Action
3.	<p>Either <b>Find an Existing Value</b> (Person is already designated as an instructor in PeopleSoft), or <b>Add a New Value</b> (Designate a new person as an instructor.)</p> <p>We will designate a new instructor. Click the <b>Add a New Value</b> tab.</p>



Step	Action
4.	Enter the desired information into the <b>Instructor ID</b> field. Example: "KR0028".
5.	Click the <b>Add</b> button. <div data-bbox="415 1136 532 1178" data-label="Image"> </div>

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**Instructor Profile** | **Qualification**

Instructor ID: KR0028 Luis Duarte

**Instructor Details** Find | View All First 1 of 1 Last

\*Effective Date: 07/06/2005 \*Status: Active

\*Internal/External: Internal

Vendor ID:

School Code:  School Name:

Per Unit Cost: \$0.00 USD Cost Unit: Flat Cost

Area of Expertise: Communications

Description: Luis Duarte has over 5 years experience teaching communications.

▶ Mexico

▶ France

Save Notify Add Update/Display Include History Correct History

[Instructor Profile](#) | [Qualification](#)

**Menu**

- ▶ Training Budget
- ▶ Student Enrollment
- ▶ Result Tracking
- ▶ Cost Analysis
- ▶ Training Reports
- ▶ Course Reports
- ▼ Define Training
  - Resources
    - Training Facilities
    - Equipment and Materials
  - Instructors
  - Vendors
  - Vendor Contacts
- ▶ Define Course/Cost Details
  - Add a Person
  - Modify a Person
  - Administer Training Requests
- ▶ Workforce Monitoring
- ▶ Pension
- ▶ Campus Community
- ▶ Student Recruiting
- ▶ Student Admissions
- ▶ Records and Enrollment
- ▶ Curriculum Management
- ▶ Financial Aid
- ▶ Student Financials
- ▶ Academic Advising
- ▶ Contributor Relations
- ▶ Set Up HRMS
- ▶ Set Up SACR
- ▶ Enterprise Components
- ▶ Worklist
- ▶ Application Diagnostics
- ▶ Tree Manager
- ▶ Reporting Tools
- ▶ PeopleTools
- ▶ Packaging
- Careers
- Change My Password
- My Personalizations
- My System Profile
- My Dictionary

Step	Action
6.	Click the <b>Qualification</b> tab.
7.	Use the <b>Qualification</b> page to add, update, or display the courses that the instructor is qualified to teach.



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**Instructor Profile | Qualification**

Instructor: KR0028 Luis Duarte

**Courses Qualified to Teach** Find | View All First 1 of 1 Last

'Course Code'

**Competencies Match Analysis**

0 out of 0

[Matching Competencies](#)

**Accomplishments Match Analysis**

0 out of 0

[Matching Accomplishments](#)

[Save](#) [Notify](#) [Add](#) [Update/Display](#) [Include History](#) [Correct History](#)


[Instructor Profile](#) | [Qualification](#)

**Menu**

- Training Budget
- Student Enrollment
- Result Tracking
- Cost Analysis
- Training Reports
- Course Reports
- Define Training
  - Resources
    - Training Facilities
    - Equipment and Materials
  - Instructors
    - Vendors
    - Vendor Contacts
- Define Course/Cost Details
  - Define Budget
  - Add a Person
  - Modify a Person
  - Administer Training Requests
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  - My Personalizations
  - My System Profile
  - My Dictionary

Step	Action
8.	In the <b>Course Code</b> field, specify a course code from the list of courses that the instructor will teach. Enter the desired information into the <b>*Course Code</b> field. Example: " <b>K005</b> ".
9.	To list an additional course the instructor is qualified to teach, you would click the plus (+) key. This would give you another row, where you can add an additional <b>Course Code</b> .

The screenshot shows the PeopleSoft Enterprise Learning Test interface. On the left is a navigation menu with options like Training Budget, Student Enrollment, Result Tracking, Cost Analysis, Training Reports, Course Reports, Define Training, Resources, Training Facilities, Equipment and Materials, Instructors, Vendors, Vendor Contacts, Define Course/Cost Details, Define Budget, Add a Person, Modify a Person, Administer Training Requests, Workforce Monitoring, Pension, Campus Community, Student Recruiting, Student Admissions, Records and Enrollment, Curriculum Management, Financial Aid, Student Financials, Academic Advising, Contributor Relations, Set Up HRMS, Set Up SACR, Enterprise Components, Worklist, Application Diagnostics, Tree Manager, Reporting Tools, PeopleTools, Packaging, Careers, Change My Password, My Personalizations, My System Profile, and My Dictionary. The main content area is titled 'Instructor Profile Qualification' and shows details for Instructor KR0028, Luis Duarte. It includes a 'Courses Qualified to Teach' section with a search for 'Course Code' K005 and a list of 'Professional Presentations'. Below this are two match analysis boxes: 'Competencies Match Analysis' and 'Accomplishments Match Analysis', both showing '0 out of 0' matches. At the bottom are buttons for Save, Notify, Add, Update/Display, Include History, and Correct History. A link for 'Instructor Profile Qualification' is also present.

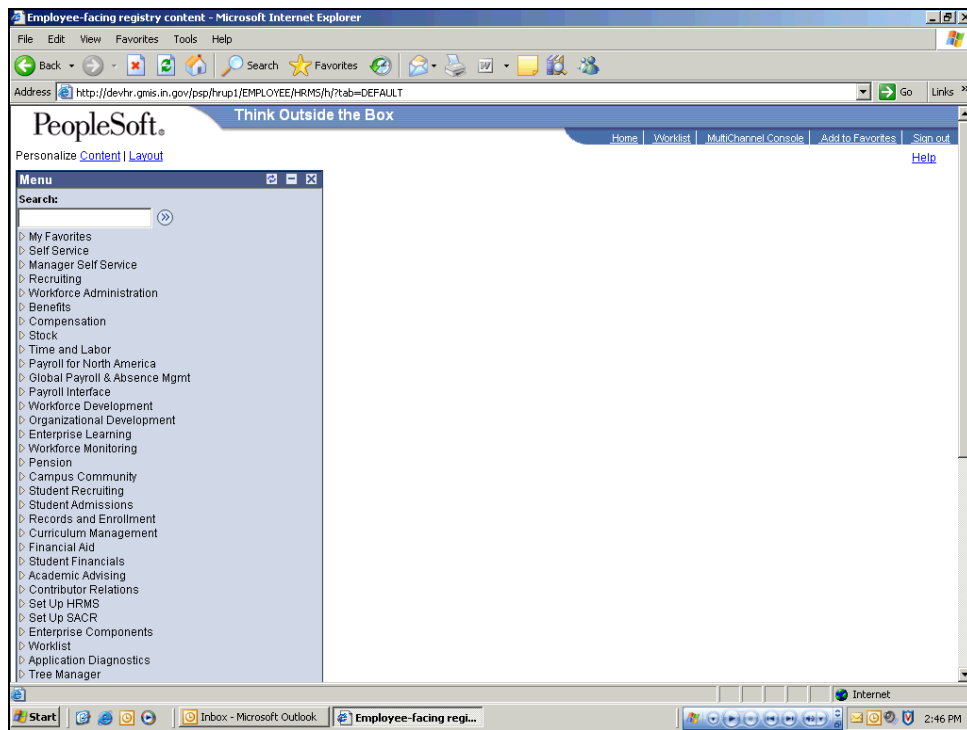
Step	Action
10.	Click the <b>Save</b> button. 
11.	You have successfully added Luis Duarte as an instructor. <b>End of Procedure.</b>

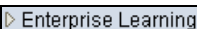
## Add a Person

### Add a Person (External Trainee)

#### Procedure

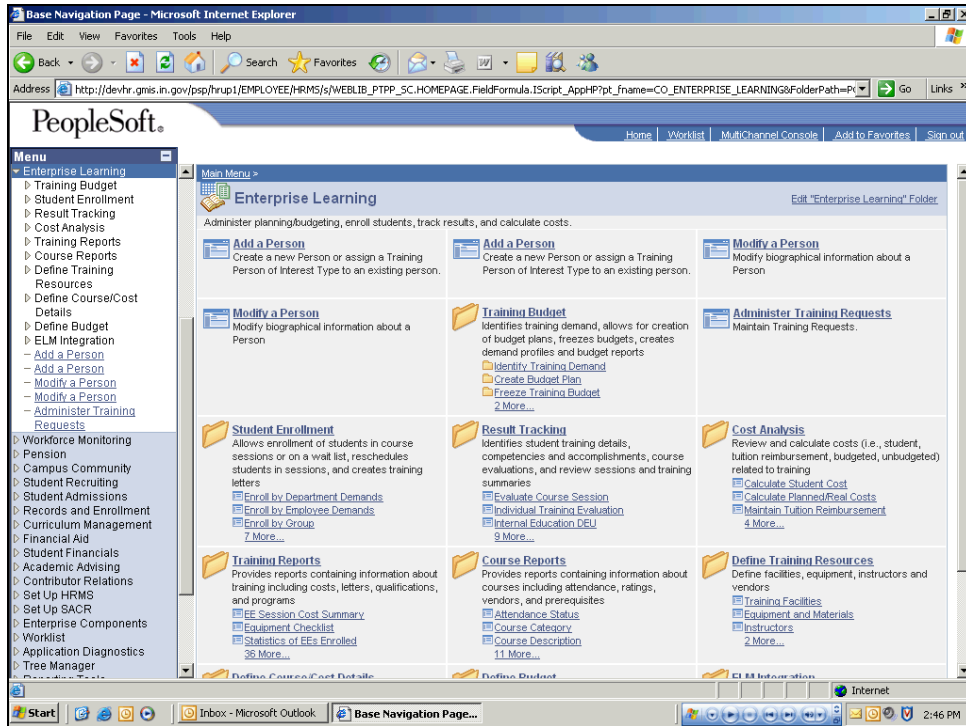
There are times when you may have trainees in your classes you want to track through PeopleSoft who are not regular state employees, e.g., contract employees. External employees are not input into the PeopleSoft system so you will need to add them as an external trainee before attempting to enroll them in a course.



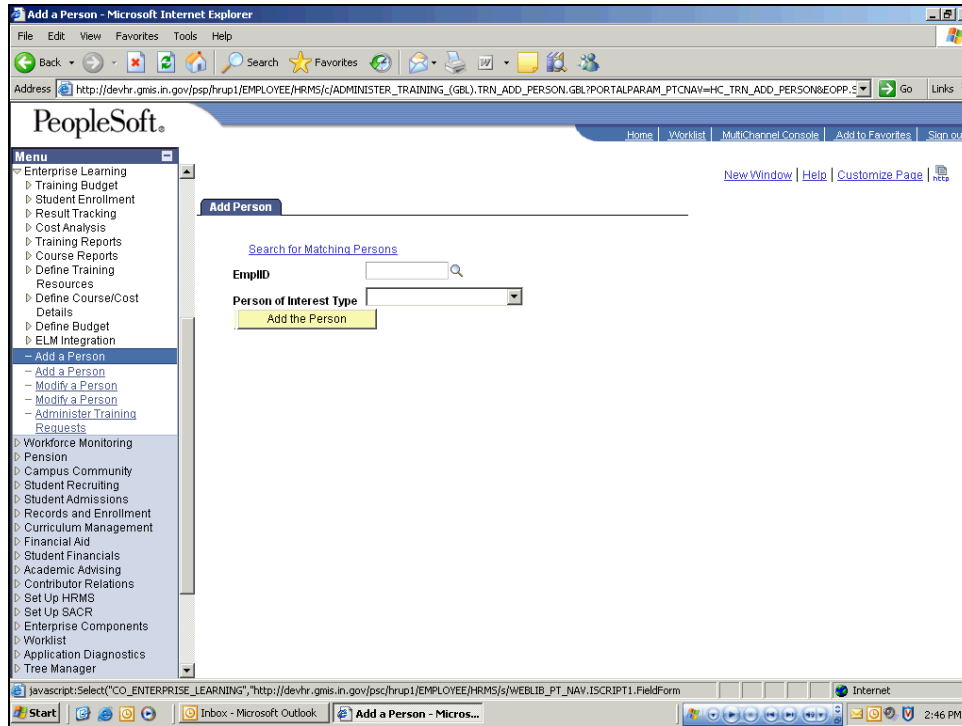
Step	Action
1.	Click the <b>Enterprise Learning</b> link. 


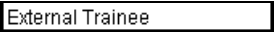
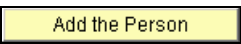
# Training Guide

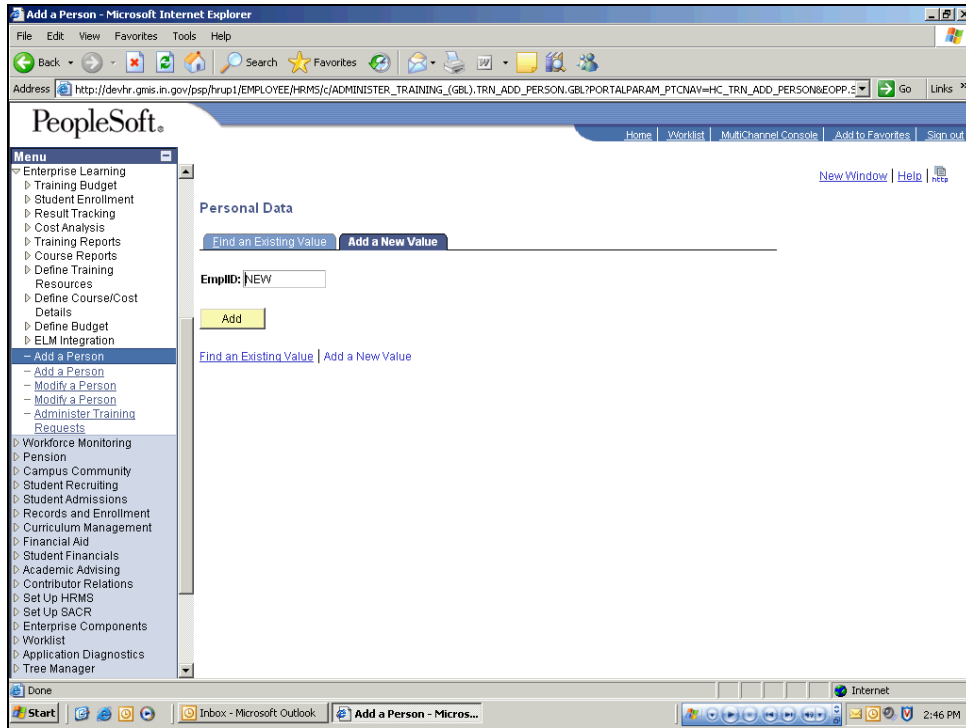
## Enterprise Learning Test



Step	Action
2.	Click the <b>Add a Person</b> button.



Step	Action
3.	Click the <b>Person of Interest Type</b> list. 
4.	Select "External Trainee." 
5.	Click the <b>Add the Person</b> button. 



Step	Action
6.	Click the <b>Add</b> button. <div data-bbox="321 1087 435 1129" data-label="Image"> </div>

**Add a Person - Microsoft Internet Explorer**

Address: http://devhr.gmis.in.gov/psp/hrup1/EMPLOYEE/HRMS/c/ADMINISTER\_TRAINING\_(GBL),TRN\_ADD\_PERSON.GBL?PORTALPARAM\_PTCNAV=HC\_TRN\_ADD\_PERSON&EOPP=S

**PeopleSoft**

Menu: Enterprise Learning, Training Budget, Student Enrollment, Result Tracking, Cost Analysis, Training Reports, Course Reports, Define Training Resources, Define Course/Cost Details, Define Budget, ELM Integration, **Add a Person**, Modify a Person, Administer Training Requests, Workforce Monitoring, Pension, Campus Community, Student Recruiting, Student Admissions, Records and Enrollment, Curriculum Management, Financial Aid, Student Financials, Academic Advising, Contributor Relations, Set Up HRMS, Set Up SACR, Enterprise Components, Worklist, Application Diagnostics, Tree Manager

**Biographic Details** | Contact Information | Regional | Organizational Relationships

Person ID: NEW

**Primary Name** Find | View All | First 1 of 1 | Last

Effective Date: 12/21/2006

Format Type: [v]

Display Name: [Add Name](#)

**Biographic Information**

Date of Birth: [v] 0 Years 0 Months

Birth Country: USA United States

Birth State: [v]

Birth Location: [v] Waive Data Protection ☐

**Biographic History** Find | View All | First 1 of 1 | Last

Effective Date: 12/21/2006

Gender: Unknown

Highest Education Level: A-Not Indicated

Marital Status: Single As of: [v]

Language Code: [v]




Alternate ID: [v]

☐ Full-Time Student

**National ID** Customize | Find | View All | First 1 of 1 | Last


Country: [v] National ID Type: [v] National ID: [v] Primary ID: [v]

Step	Action
7.	For the effective date, enter the first day this person began their working relationship with your agency. 12/21/2006

Step	Action
8.	Click the <b>*Format Type</b> list. 
9.	Select English in the drop down list. 
10.	Click the <b>Add Name</b> link. 



The screenshot shows a web browser window titled "Add a Person - Microsoft Internet Explorer". The address bar shows a URL starting with "http://devhr.gmis.in.gov/psp/hrup1/EMPLOYEE/HRMS/c/ADMINISTER\_TRAINING\_(GBL),TRN\_ADD\_PERSON.GBL?PORTALPARAM\_PTCNAV=HC\_TRN\_ADD\_PERSON&EOPP...". The PeopleSoft logo is visible at the top left. A menu on the left lists various options, with "Add a Person" selected. The main content area is titled "Edit Name" and contains the "English Name Format" section. This section includes fields for "Prefix", "First Name", "Middle Name", "Last Name", and "Suffix". Below these is a "Display Name" section with "Formal Name" and "Name" fields. At the bottom of the form are "OK", "Cancel", and "Refresh" buttons. The "OK" button is highlighted with a yellow background.

Step	Action
11.	Enter the desired information into the <b>First Name</b> field. Example: " <b>John</b> ".
12.	Enter the desired information into the <b>Last Name</b> field. Example: " <b>Student</b> ".
13.	Click the <b>OK</b> button. 

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Menu

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  - Result Tracking
  - Cost Analysis
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- Set Up SACR
- Enterprise Components
- Worklist
- Application Diagnostics
- Tree Manager

Biographical Details | Contact Information | Regional | Organizational Relationships

John Student Person ID: NEW

Primary Name Find | View All First 1 of 1 Last

Effective Date: 12/21/2006

Format Type: English

Display Name: John Student Edit Name

Biographic Information

Date of Birth: 0 Years 0 Months

Birth Country: USA United States

Birth State: United States

Birth Location: Waive Data Protection

Biographical History Find | View All First 1 of 1 Last

Effective Date: 12/21/2006

Gender: Unknown

Highest Education Level: A-Not Indicated

Marital Status: Single As of:

Language Code:

Alternate ID:

National ID

Country: National ID Type National ID Primary ID

Step	Action
14.	Enter the desired information into the <b>Date of Birth</b> field. Example: " <b>010182</b> ".
15.	Leave gender as "Unknown" for External Trainee. Unknown
16.	Click the <b>*Marital Status</b> list. Single
17.	Select "Unknown" for Marital Status for External Trainee.
18.	Click the <b>*National ID Type</b> list. Social Security Number
19.	Select "Driver's License Number" for External Trainee. Driver's License Number
20.	Enter the external trainee's Driver's License or State ID number into the <b>National ID</b> field. Example: " <b>2156-89-6532</b> ".

**Add a Person - Microsoft Internet Explorer**

File Edit View Favorites Tools Help

Address http://devhr.gmis.in.gov/psp/hrup1/EMPLOYEE/HRMS/c/ADMINISTER\_TRAINING\_(GBL),TRN\_ADD\_PERSON.GBL?PORTALPARAM\_PTCNAV=HC\_TRN\_ADD\_PERSON&EOPP... Go Links

**PeopleSoft** Home Worklist MultiChannel Console Add to Favorites Sign out

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- Tree Manager

**Biographical Details** Contact Information Regional Organizational Relationships

John Student **Person ID:** NEW

**Primary Name** Find | View All First 1 of 1 Last

**Effective Date:** 12/21/2006

**Format Type:** English

**Display Name:** John Student [Edit Name](#)

**Biographic Information**

**Date of Birth:** 01/01/1982 24 Years 11 Months

**Birth Country:** USA United States

**Birth State:**

**Birth Location:**  **Waive Data Protection** ☐

**Biographical History** Find | View All First 1 of 1 Last

**Effective Date:** 12/21/2006

**Gender:** Male

**Highest Education Level:** A-Not Indicated

**Marital Status:** Single **As of:**

**Language Code:**

**Alternate ID:**  ☐ Full-Time Student

**National ID** Customize | Find | View All First 1 of 1 Last

**Country:** **National ID Type:** **National ID:** **Primary ID:**

Done Start | Inboxes - Microsoft Outlook | Add a Person - Micros... 2:49 PM

Step	Action
21.	Click the <b>Contact Information</b> tab. <a href="#">Contact Information</a>

PeopleSoft®

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- Tree Manager

John Student Person ID: NEW

Current Addresses

Address Type	As Of Date	Status	Address
Home			

Add Address Detail

Phone Information

Phone Type	Telephone	Extension	Preferred

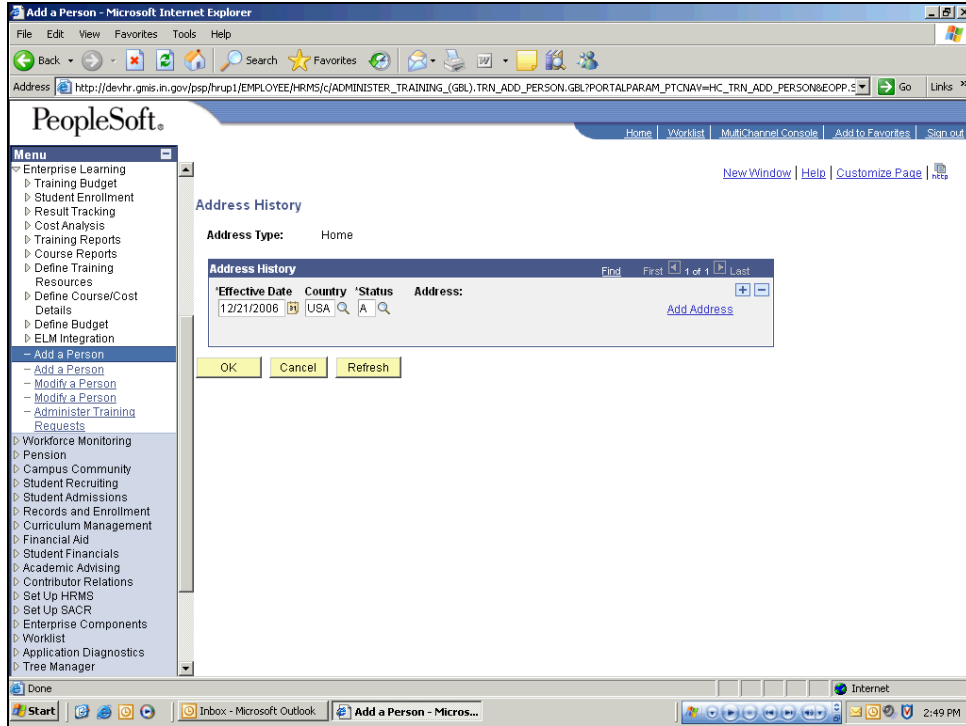
Email Addresses

Email Type	Email Address	Preferred

OK Cancel Apply Previous tab Next tab Refresh


Biographical Details | Contact Information | Regional | Organizational Relationships

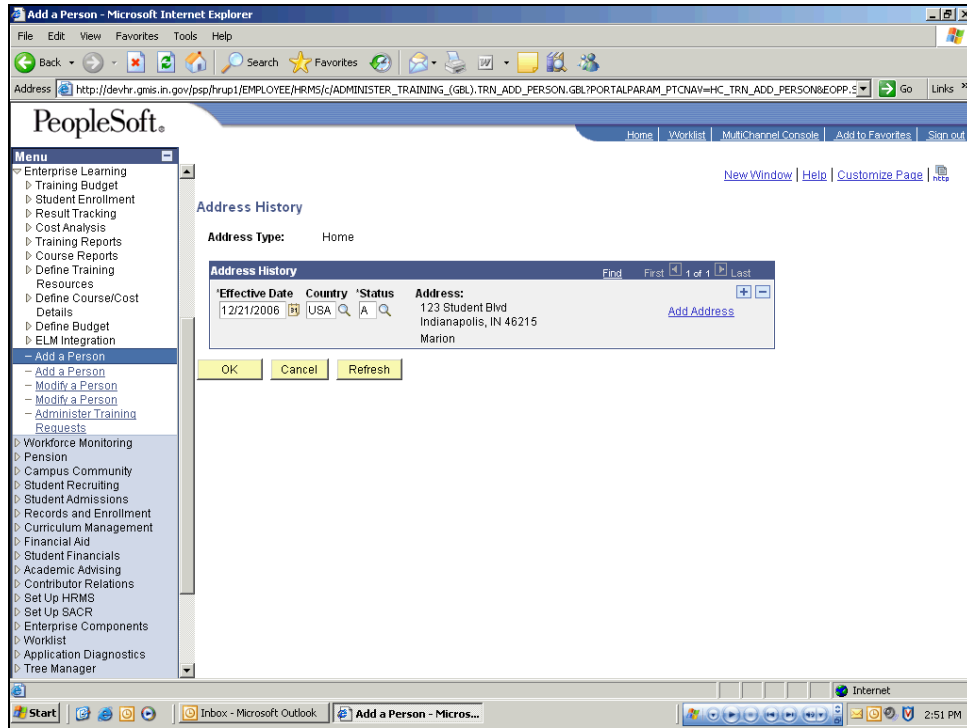
Step	Action
22.	Click the <b>Add Address Detail</b> link. <a href="#">Add Address Detail</a>





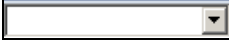

Step	Action
23.	Click the <b>Add Address</b> link. <a href="#">Add Address</a>

The screenshot shows the 'Add a Person' form in the PeopleSoft Enterprise Learning Test application. The form is displayed in a Microsoft Internet Explorer browser window. The address fields are highlighted in blue. The 'Country' field is set to 'United States'. The 'Address 1' field is highlighted in blue. The 'City' field is set to 'Indianapolis'. The 'State' field is set to 'IN'. The 'Postal' field is set to '46215'. The 'County' field is set to 'Marion'. The 'OK' button is highlighted in yellow.

Step	Action
24.	Enter the desired information into the <b>Address 1</b> field. Example: " <b>123 Student Blvd</b> ".
25.	Enter the desired information into the <b>City</b> field. Example: " <b>Indianapolis</b> ".
26.	Enter the desired information into the <b>State</b> field. Example: " <b>IN</b> ".
27.	Press the Tab key.
28.	Enter the desired information into the <b>Postal</b> field. Example: " <b>46215</b> ".
29.	Enter the desired information into the <b>County</b> field. Example: " <b>Marion</b> ".
30.	Click the <b>OK</b> button. 



Step	Action
31.	Click the <b>OK</b> button. <div>OK</div>

Step	Action
32.	Choose a <b>Phone Type</b> in the drop down list. 
33.	Enter the desired information into the <b>Telephone</b> field. Example: " <b>3178653265</b> ".
34.	Press the Tab key.
35.	Click the <b>Preferred</b> option. 
36.	Choose an <b>Email Type</b> from the drop down list. 
37.	Enter the desired information into the <b>*Email Address</b> field. Example: " <b>jstudent@myhome.com</b> ".
38.	Click the <b>Preferred</b> option. 



**Add a Person - Microsoft Internet Explorer**

File Edit View Favorites Tools Help

Address [http://devhr.gmis.in.gov/psp/thrup1/EMPLOYEE/HRMS/c/ADMINISTER\\_TRAINING\\_GBL,TRN\\_ADD\\_PERSON.GBL?PORTALPARAM\\_PTCNAV=HC\\_TRN\\_ADD\\_PERSON&EOPP=5](http://devhr.gmis.in.gov/psp/thrup1/EMPLOYEE/HRMS/c/ADMINISTER_TRAINING_GBL,TRN_ADD_PERSON.GBL?PORTALPARAM_PTCNAV=HC_TRN_ADD_PERSON&EOPP=5) Go Links

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  - Tree Manager

**Biographical Details** **Contact Information** **Regional** **Organizational Relationships**

**Person ID:** NEW

**Current Addresses** [Customize](#) [Find](#) [View All](#) [First](#) [1 of 1](#) [Last](#)

Address Type	As Of Date	Status	Address	<a href="#">Edit/View Address Detail</a>	
Home	12/21/2006	A	123 Student Blvd Indianapolis, IN 46215 Marion	<a href="#">Edit/View Address Detail</a>	<a href="#">+</a> <a href="#">-</a>

**Phone Information** [Customize](#) [Find](#) [View All](#) [First](#) [1 of 1](#) [Last](#)

Phone Type	Telephone	Extension	Preferred	
Cellular	317/865-3265		<input checked="" type="checkbox"/>	<a href="#">+</a> <a href="#">-</a>

**Email Addresses** [Customize](#) [Find](#) [View All](#) [First](#) [1 of 1](#) [Last](#)

Email Type	Email Address	Preferred	
Business	jstudent@myhome.com	<input checked="" type="checkbox"/>	<a href="#">+</a> <a href="#">-</a>

OK Cancel Apply Previous tab Next tab Refresh

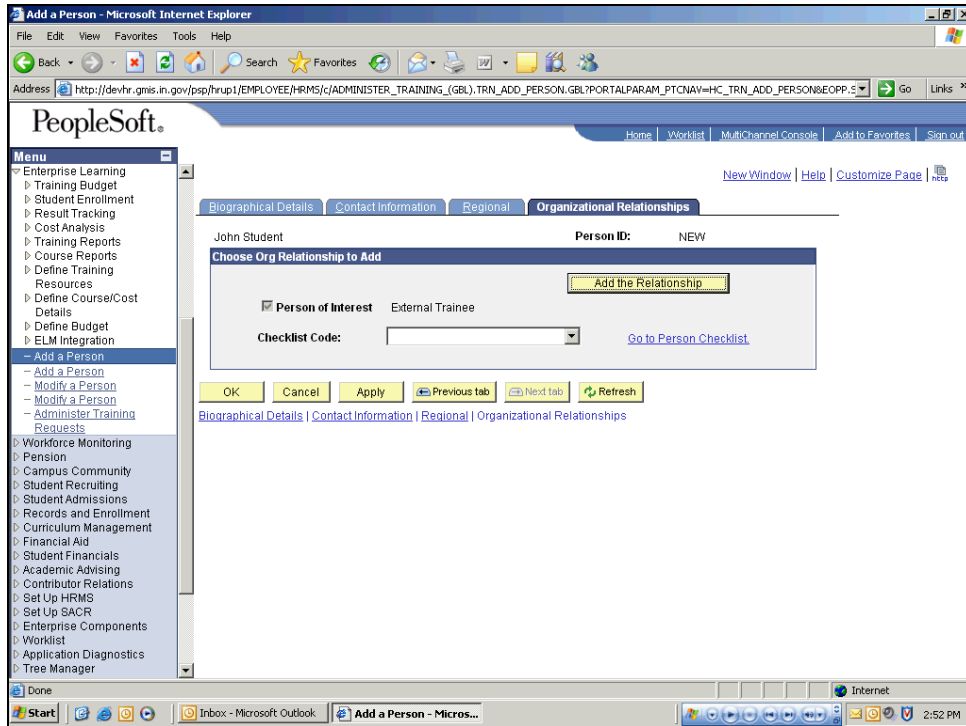
[Biographical Details](#) | [Contact Information](#) | [Regional](#) | [Organizational Relationships](#)

Done

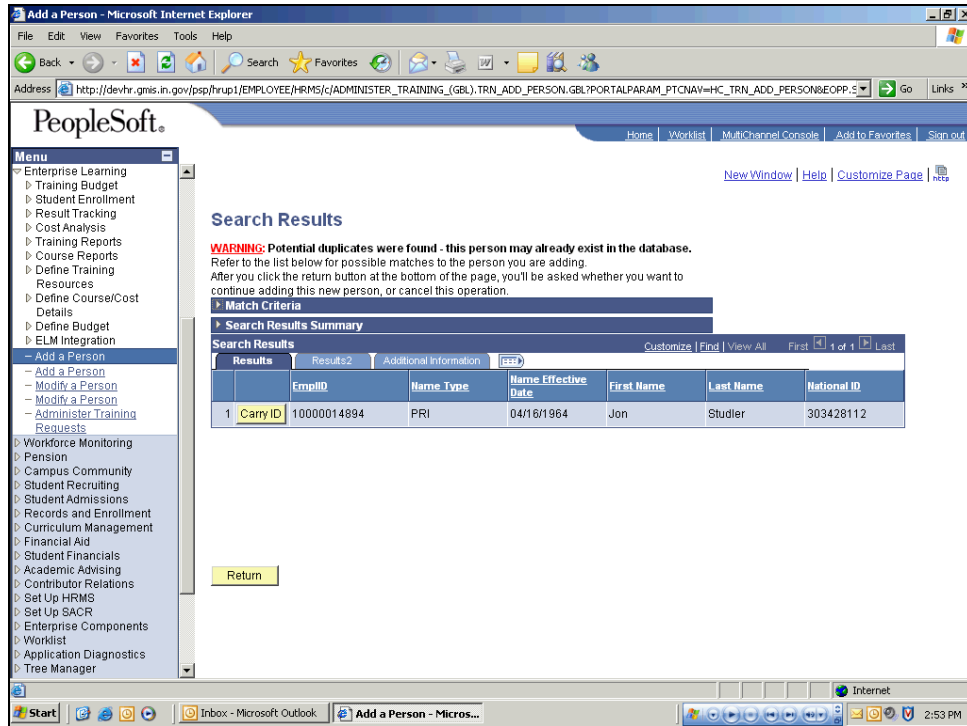
Start | [Inbox - Microsoft Outlook](#) | [Add a Person - Micros...](#) | [Internet](#)

2:52 PM

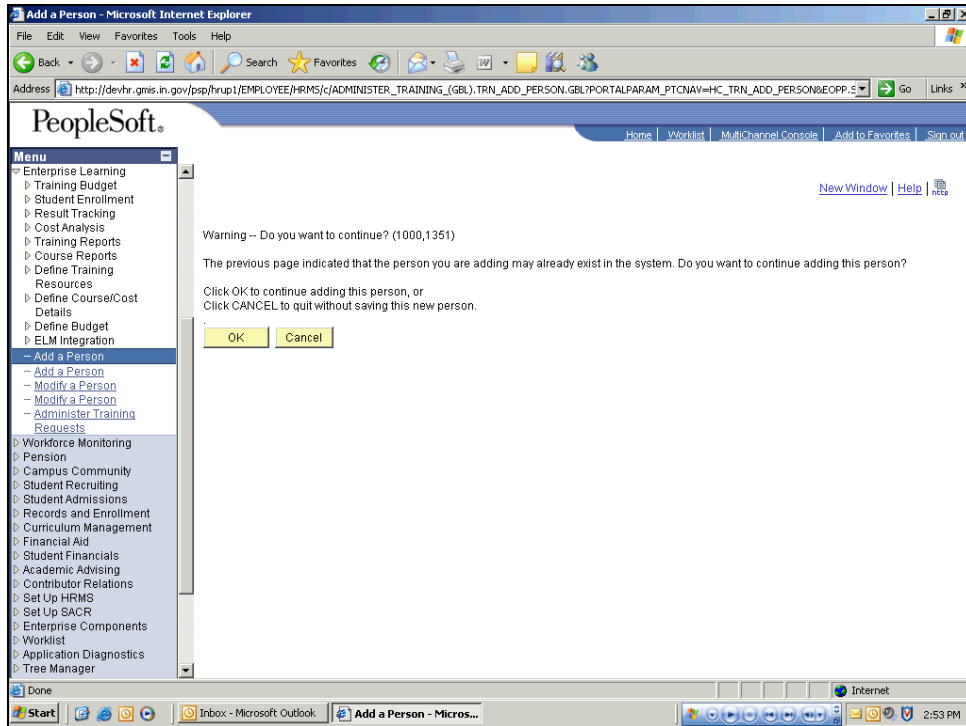
Step	Action
39.	Click the <b>Organizational Relationships</b> tab. <a href="#">Organizational Relationships</a>



Step	Action
40.	Click the <b>Add the Relationship</b> button. <div style="border: 1px solid black; padding: 2px; display: inline-block;">Add the Relationship</div>



Step	Action
41.	<p>Click the <b>Return</b> button.</p> <p>This screen will display all values matched by first name, last name, and National ID number. This search is utilized to determine if the person being added already has a record in the PeopleSoft system. If there is a match for the person being added, click "Carry ID" to utilize the PeopleSoft ID number already assigned to this person. If no match exists, click on Return. If no match exists when you click on Return a PeopleSoft Empl ID# will be assigned automatically by the system.</p> <p><b>Return</b></p>



Step	Action
42.	Click the <b>OK</b> button. <div data-bbox="321 1087 435 1129" data-label="Image"> </div>

**Add a Person - Microsoft Internet Explorer**

Address: http://devhr.gmis.in.gov/psp/hrup1/EMPLOYEE/HRMS/c/ADMINISTER\_TRAINING\_(GBL),TRN\_ADD\_PERSON.GBL?PORTALPARAM\_PTCNAV=HC\_TRN\_ADD\_PERSON&EOPP...>

**PeopleSoft®** Home | Worklist | MultiChannel Console | Add to Favorites | Sign out

New Window | Help | Customize Page | **Saved**

**Add Person of Interest**

John Student **Person ID:** 10000240668

**Person of Interest Type:** External Trainee

**Security Data** Find | View All | First 1 of 1 | Last

**Effective Date:** 12/21/2006 **Get Enabled Security Types** + -

Security Access Type	Enabled	Value 1	Value 2





**Person of Interest History** Customize | Find | First 1 of 1 | Last

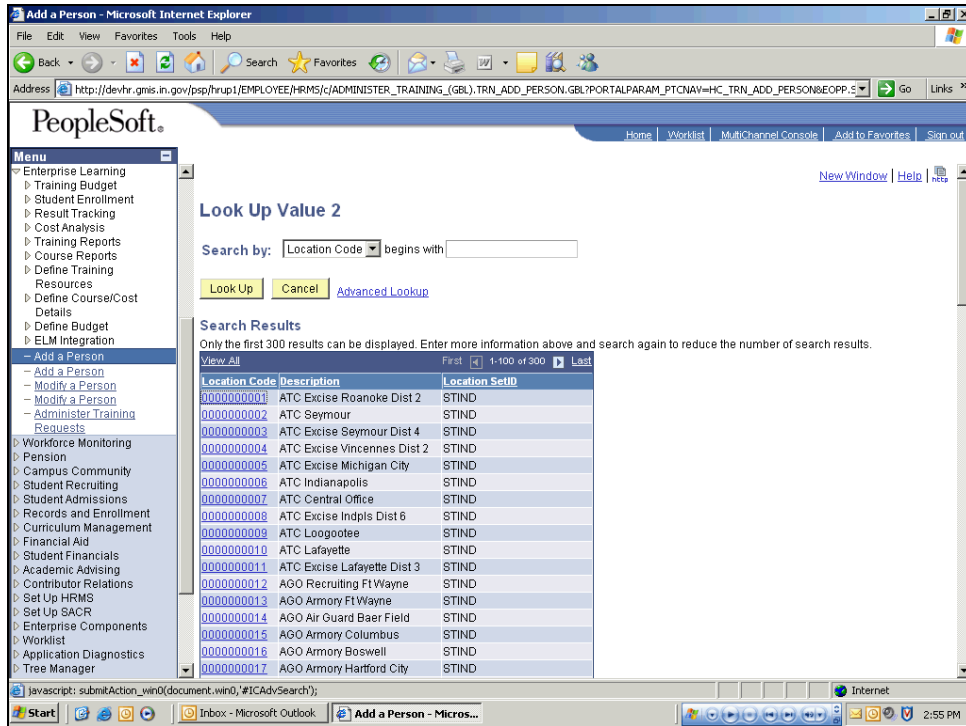
Effective Date	Status	Planned Exit	More Information
12/21/2006	A		Click column heading to sort ascending

OK Cancel Apply

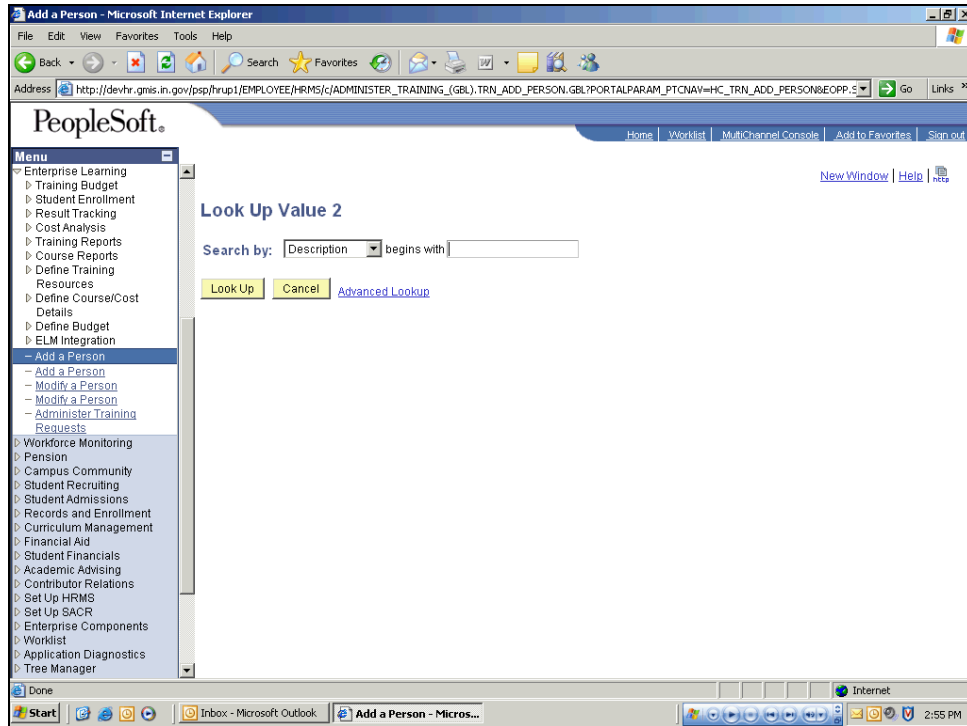
javascript:submitAction\_win0(document.win0,PER\_POI\_TRANS\$ort1\$07);

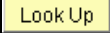

Start | Inboxes - Microsoft Outlook | Add a Person - Micros... | 2:53 PM

Step	Action
43.	Under Security Access Type, choose <b>Business Unit</b> . 
44.	Enter the Business Unit into the <b>Value 1</b> field. Example: " <b>00070</b> ".
45.	Press the Tab key.
46.	Click the <b>Add a new row at row 1 (Alt+7)</b> button. 
47.	In the newly added row under Security Access Type, choose <b>Location</b> . 
48.	Press the Tab key.
49.	Click the <b>Look up Value 2 (Alt+5)</b> button. 



Step	Action
50.	Choose <b>Description</b> from the drop down list. <div>Location Code ▼</div>



Step	Action
51.	Enter the desired information into the <b>begins with</b> field. Example: " <b>state</b> ".
52.	Click the <b>Look Up</b> button. 
53.	Choose <b>State Personnel Department</b> from the Search Results list. 

**Add a Person - Microsoft Internet Explorer**

Address: http://devhr.gmis.in.gov/psp/hrup1/EMPLOYEE/HRMS/c/ADMINISTER\_TRAINING\_(GBL),TRN\_ADD\_PERSON.GBL?PORTALPARAM\_PTCNAV=HC\_TRN\_ADD\_PERSON&EOPF=...

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  - Enterprise Components
  - Worklist
  - Application Diagnostics
  - Tree Manager

**Add Person of Interest**

John Student      **Person ID:** 10000240668

**Person of Interest Type:** External Trainee

**Security Data** Find | View All First 1 of 1 Last

**Effective Date:** 12/21/2006 Get Enabled Security Types

Security Access Type	Enabled	Value 1	Value 2
BUSINESS UNIT	<input checked="" type="checkbox"/>	Business Unit 00070	
LOCATION	<input type="checkbox"/>	Business Unit 00070	Location Code 0000000971

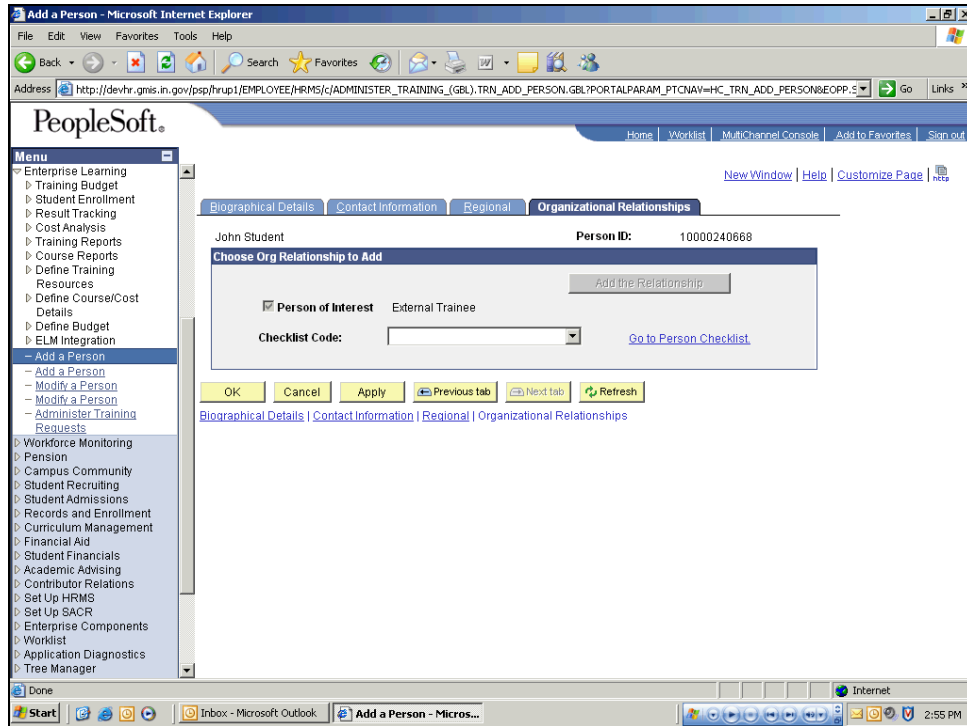
**Person of Interest History** Customize | Find | First 1 of 1 Last

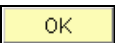
Effective Date	Status	Planned Exit	More Information
1 12/21/2006	A		

OK Cancel Apply

Step	Action
54.	Click the <b>OK</b> button. OK





Step	Action
55.	Click the <b>OK</b> button. 
56.	<b>End of Procedure.</b>



## Enrolling Students

### Enrolling Students Individually

Once you have set up your course sessions, you are ready to start enrolling students and adding students to course and session waiting lists. There are several methods of enrolling students, so you can select the best option for your facility. For example, you may set up sessions in advance and publish a training schedule that students review and submit enrollment requests.

Alternatively, you may prefer to set up waiting lists and create course sessions when there are enough students on the lists to fill the session.

You use the **Course Session Enrollment** page to enroll students individually in a session. Before enrolling students, you set up the session by using the Course Session table.

You can use the **Course Session Enrollment** page to enroll multiple students in the same session. You may enroll students or adjust the existing enrollment status codes for students already enrolled. For instance, if a student requests to withdraw their enrollment in the class, you would change the status from enrolled to dropped.

**NOTE: You may only view and change enrollments for course sessions that have not been marked Complete.**

In this example, two employees want to enroll in the Presentation Skills course session 0001. Your goal is to enroll these students individually in this session and verify their enrollments.

## Procedure



Step	Action
1.	Begin by navigating to the <b>Course Session Enrollment</b> page. Click the <b>Enterprise Learning</b> link. <a href="#">Enterprise Learning</a>
2.	Click the <b>Student Enrollment</b> link.
3.	Click the <b>Enroll Individually</b> link.

**PeopleSoft**

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**Enroll Individually**

Enter any information you have and click Search. Leave fields blank for a list of all values.

**Find an Existing Value**

Course Code:

Course Session Nbr:

Description:

Course Start Date:


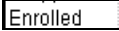

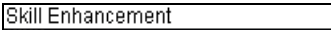
Training Facility:





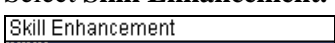

Session Language:

☐ Case Sensitive

[Basic Search](#) [Save Search Criteria](#)

Step	Action
4.	Enter the desired information into the <b>Course Code</b> field. Example: " <b>BSK001</b> ".
5.	Click in the <b>Course Session Nbr</b> field. <input type="text"/>
6.	Enter the desired information into the <b>Course Session Nbr</b> field. Example: " <b>0001</b> ".
7.	Click the <b>Search</b> button. <input type="button" value="Search"/>
8.	Use the <b>Course Session Enrollment</b> page to enroll students.  <b>CAUTION:</b> As you select each student for enrollment, always double-check the Business Unit field and verify that it is the correct employee. Name searches sometimes display more than one individual with the same name.

Step	Action
9.	Enter the desired information into the <b>EmplID</b> field. Example: " <b>KR0040</b> ".
10.	Specify the student enrollment status, such as Enrolled or Sessn Wait in the <b>Enrollment/Attendance</b> field. Click the <b>*Enrollment/Attendance</b> list. 
11.	Select <b>Enrolled</b> . 
12.	The <b>Status Date</b> field uses the current system date by default. Accept the default date for this field.
13.	Specify the reason for training in the <b>Training Reason</b> field. Click the <b>Training Reason</b> list. 
14.	Click an entry in the list.  Always select <b>Skill Enhancement</b> . 

Step	Action
15.	<p>Leave the <b>Prerequisites Met</b> option turned off. After you have finished all enrollments, you may use <b>Prerequisite Checking</b> (above) to verify that your students' course requirements have been met.</p> <p>Prerequisites, if used, would need to be set up when the Course is entered into the system.</p>
16.	<p>You may use the <b>Prerequisite Checking</b> button to search the Student Training records listed on the <b>Session Enrollment</b> page and determine if each student has completed and passed the prerequisite courses.</p> <p>If so, PeopleSoft populates the <b>Prerequisites Met</b> check box for each student who meets the criteria. If a student is lacking the necessary courses, a process for notifying students of discrepancies may be developed. Also, any enrolled status existing for students who do not meet the prerequisites may be manually changed.</p>
17.	<p>Use the <b>Letter Code</b> field to generate a form letter. The letter code defaults to CON, indicating Confirmed. For this exercise, accept the default letter code value.</p> <p><b>IMPORTANT!!</b> The system does not currently support the generation of letters. At this time, you must have an alternative method of notifying students.</p>
18.	<p>We will now add another student.</p> <p>Click the <b>Add Row</b> button.</p> 
19.	Enter the desired information into the <b>EmplID</b> field. Example: " <b>KR0041</b> ".
20.	<p>Click the <b>*Enrollment/Attendance</b> list.</p> 
21.	<p>Click an entry in the list.</p> <p>Select <b>Enrolled</b>.</p> 
22.	<p>Click the <b>Training Reason</b> list.</p> 
23.	<p>Click an entry in the list.</p> <p>Select <b>Skill Enhancement</b>.</p> 
24.	You have enrolled two employees in Presentation Skills course session 0001. If you enroll more than the maximum number of employees allowed in the session, the PeopleSoft application issues a warning message when you save the page.
25.	<p>Your enrollment(s) are completed.</p> <p>Click the <b>Save</b> button.</p> 

Step	Action
26.	You have successfully enrolled individual students into a course session. <b>End of Procedure.</b>



## Creating a Wait List

**Wait lists** are used to organize the enrollment process and ensure fair enrollment. In addition, you use wait lists to monitor course demand and create sessions when enrollment demand is high. Alternatively, they are used to collect requests for existing course sessions, and enable automatic enrollment of students in the session.

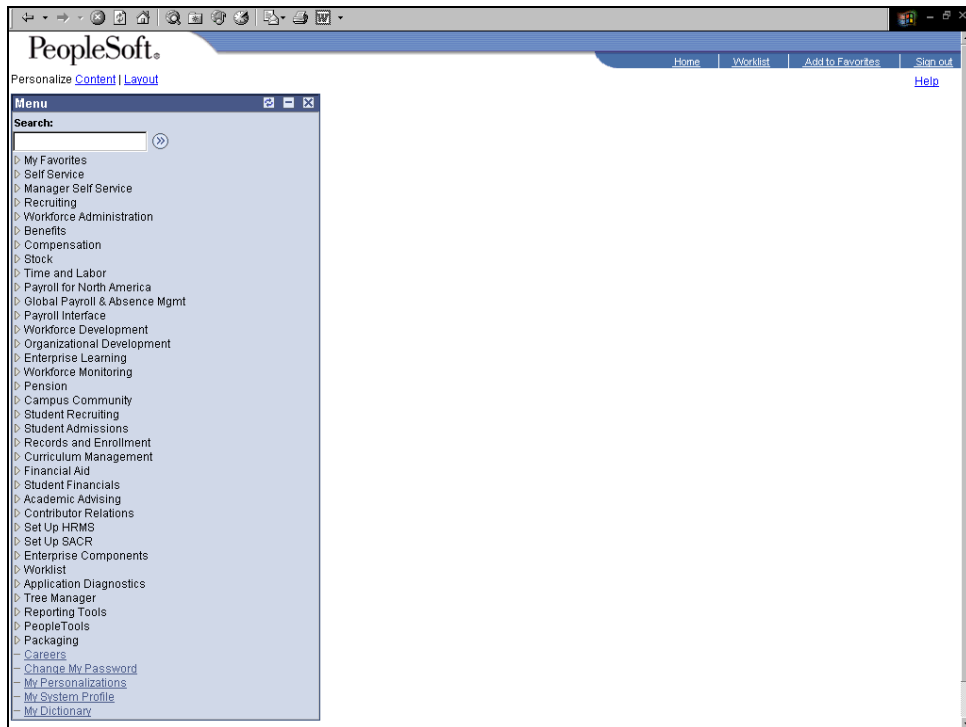
With the use of wait lists and automatic session enrollment, it is necessary to understand the way PeopleSoft processes information. The order in which students are enrolled from wait lists into sessions is determined by the PeopleSoft processing logic.

When using course auto-enrollment, the session for which students are being enrolled must be specified. Once the session is selected, PeopleSoft enrolls students in the following order of preference or hierarchy:

- **Session Waitlist Status:** Students with session wait list for the particular session selected are given priority over any student with a general course wait list status.
- **Waitlist Date:** Students with session wait list status are then sorted for enrollment based on their wait list date, the date they were entered onto the wait list. Generally, the student with the oldest date is given first priority. If multiple students share the same date, priority is based on ID.
- **ID:** Among students who share the same session wait list date, employees always get first opportunity for training sessions. If all of those employees have been enrolled, then non-employees with that same session wait list date are enrolled.
- If all students with session wait list status for this session have been enrolled, then students with general course wait list status are enrolled under the same wait list date and ID guidelines listed above for session wait list status.
- If a session has fewer seats available than students of equal standing, PeopleSoft does not perform any enrollment automatically. In that case, manual enrollment must be used, and some other form of selection must be imposed. Alternatively, the session could be modified to allow a larger enrollment.

In this exercise, two people requested enrollment in the Professional Presentations course session K005. Your goal is to add them to a wait list for the Professional Presentations course session.

## Procedure



Step	Action
1.	Begin by navigating to the <b>Course Wait List</b> page. Click the <b>Enterprise Learning</b> link. <a href="#">▶ Enterprise Learning</a>
2.	Click the <b>Student Enrollment</b> link.
3.	Click the <b>Create/Update Course Wait List</b> link.

PeopleSoft

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[New Window](#) [Help](#)

### Create/Update Course Wait List

Enter any information you have and click Search. Leave fields blank for a list of all values.

**Find an Existing Value**

Course Code:

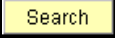
Description:

Internal/External:

Course Type:

☐ Case Sensitive

[Basic Search](#) [Save Search Criteria](#)

Step	Action
4.	Enter the desired information into the <b>Course Code</b> field. Example: " <b>K005</b> ".
5.	Click the <b>Search</b> button. 
6.	Use the <b>Course Wait List</b> page to add employees and non-employees to wait lists and assign the enrollment status. For this exercise, add two employees to the wait list. To add them to the wait list, specify their IDs in the <b>EmplID</b> field.

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**Menu**

- Student Enrollment
  - Enroll by Department Demands
  - Enroll by Employee Demands
  - Enroll by Group
  - Enroll Individually
- Create/Update Course Wait List
  - Course Session Auto Enrollment
  - Reschedule Between Sessions
  - Enroll in Course
  - Quick Enrollment
  - Create Training Letters
- Result Tracking
- Cost Analysis
- Training Reports
- Course Reports
- Define Training Resources
- Define Course/Cost Details
- Define Budget
  - Add a Person
  - Modify a Person
  - Administer Training Requests
- Workforce Monitoring
- Pension
- Campus Community
- Student Recruiting
- Student Admissions
- Records and Enrollment
- Curriculum Management
- Financial Aid
- Student Financials
- Academic Advising
- Contributor Relations
- Set Up HRMS
- Set Up SACR
- Enterprise Components
- Worklist
- Application Diagnostics

**Course Wait List**

Course: K005 Professional Presentations



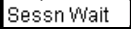


# Waiting: 0

Attendance

EmplID	Empl Bcd#	Name	Attendance	Letter Code	Waitlist Dt	Session #	Status Date
0		Crse Wait	WTC		07/07/2005		07/07/2005

Save Return to Search Notify

Step	Action
7.	Enter the desired information into the <b>EmplID</b> field. Example: " <b>KU0097</b> ".
8.	Assign a wait list status to the employee in the <b>Attendance</b> field. The PeopleSoft application provides a course wait list and a session wait list. Use both of these statuses in the processing logic when enrolling students from a wait list to a session. Click the <b>*Attendance</b> list. 
9.	Click an entry in the list. 
10.	The system populates a letter code from the <b>Standard Letter</b> table according to the student's wait list status. The system also populates the wait list date based on the current date. The PeopleSoft application uses this date to enroll students from the oldest date to the most recent date. You can override this date if the student requested for enrollment in the course on a different date.  For this example, accept the default wait list date in the <b>Waitlist Dt</b> field.
11.	Click in the <b>Session #</b> field. 
12.	If you assign a session wait list status to a student, specify the session number from the list of Active sessions in the <b>Session #</b> field. Enter the desired information into the <b>Session #</b> field. Example: " <b>0072</b> ".

Step	Action
13.	Click the <b>Add Row</b> button. 
14.	Enter the desired information into the <b>EmplID</b> field. Example: " <b>KU0098</b> ".
15.	Click the <b>*Attendance</b> list. 
16.	Click an entry in the list. 
17.	Click in the <b>Session #</b> field. 
18.	Enter the desired information into the <b>Session #</b> field. Example: " <b>0072</b> ".
19.	Click the <b>Save</b> button. 
20.	You have successfully created a wait list. <b>End of Procedure.</b>

## Creating a Course Session Roster

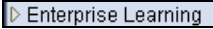
Once you have enrolled the students in a **Course Session**, you may print out the **Course Session Roster** for that session, which can be used for a **Sign-In Sheet**.

**NOTE:** Once the **Session Status** has been changed to **Completed**, you will no longer be able to print the **Course Session Roster** for that session.

In this example, we will print the **Course Session Roster** for the **Time Management** course session **0001**.

## Procedure



Step	Action
1.	Begin by navigating to the <b>Course Session Roster</b> page. Click the <b>Enterprise Learning</b> link. 
2.	Click the <b>Course Reports</b> link.
3.	Click the <b>Course Session Roster</b> link.

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**Menu**

- Course Reports
  - Attendance Status
  - Course Category
  - Course Description
  - Course Equipment
  - Course Rating
  - Course Rating Templates
- Course Session Roster
  - Courses
  - Course Vendors
  - Course Waiting List
  - Prerequisite Courses
  - Licenses and Certifications
  - Target Course
  - Certifications
  - Target Qualifications
- Define Training Resources
  - Define Course/Cost Details
  - Define Budget
    - Add a Person
    - Modify a Person
  - Administer Training Requests
- Workforce Monitoring
- Pension
- Campus Community
- Student Recruiting
- Student Admissions
- Records and Enrollment
- Curriculum Management
- Financial Aid
- Student Financials
- Academic Advising
- Contributor Relations
- Set Up HRMS
- Set Up SACR
- Enterprise Components
- Worklist
- Application Diagnostics
- Tree Manager
- Reporting Tools

**Course Session Roster**

Enter any information you have and click Search. Leave fields blank for a list of all values.

[Find an Existing Value](#) | [Add a New Value](#)

Run Control ID:  begins with


☐ Case Sensitive

[Search](#) [Clear](#) [Basic Search](#) [Save Search Criteria](#)

[Find an Existing Value](#) | [Add a New Value](#)

Step	Action
4.	<p>You will need to <b>Find an Existing</b> or <b>Add a New Value</b> for <b>Run Control ID</b>.</p> <p>We are going to <b>Add a New Value</b>.</p>

The screenshot shows the PeopleSoft interface for the 'Course Session Roster' page. On the left is a navigation menu with categories like 'Course Reports', 'Course Session Roster', and 'Define Training Resources'. The 'Course Session Roster' section is expanded, showing options like 'Courses', 'Course Vendors', and 'Course Waiting List'. The main content area has a title 'Course Session Roster' and two buttons: 'Find an Existing Value' and 'Add a New Value'. Below these is a text input field labeled 'Run Control ID:' and an 'Add' button. At the bottom of the main area are links for 'Find an Existing Value' and 'Add a New Value'.

Step	Action
5.	Enter the desired information into the <b>Run Control ID</b> field. Example: " <b>CSR01</b> ".
6.	Click the <b>Add</b> button. 
7.	Use the <b>Course Session Roster</b> page to define report parameters such as the course name, session number, and session start date.



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**Course Session Roster**

Run Control ID: CSR01 [Report Manager](#) [Process Monitor](#) [Run](#)

**Report Request Parameters:**

Course:

AND

Session #:

OR

Course Start Date:

[Save](#) [Notify](#) [Add](#) [Update/Display](#)

Step	Action
8.	Enter your <b>Course</b> number.  Example: " <b>K001</b> ".
9.	Click in the <b>Session #</b> field. <input type="text"/>
10.	In the <b>Session #</b> field, specify the course session number for which you want to run the report. Alternatively, specify the beginning date of the course in the <b>Course Start Date</b> field.  Example: <b>Session #</b> " <b>0001</b> ".
11.	Click the <b>Run</b> button. 
12.	Use the <b>Process Scheduler Request</b> page to specify the parameters that are used when running the report.

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[New Window](#) | [Help](#) | [Customize Page](#) **Saved**

### Process Scheduler Request

User ID: PS Run Control ID: CSR01

Server Name: [Dropdown] Run Date: 07/09/2005 [B] [C]

Recurrence: [Dropdown] Run Time: 3:59:50PM [Reset to Current Date/Time]

Time Zone: [Dropdown]

Select	Description	Process Name	Process Type	Type	Format	Distribution
<input checked="" type="checkbox"/>	Course Session Roster	TRN002-	Crystal	Web	PDF	<a href="#">Distribution</a>

OK Cancel

Step	Action
13.	Select <b>Web</b> from the <b>Type</b> list. <div>Web</div>
14.	Select format <b>PDF</b> . <div>PDF</div>
15.	By clicking <b>OK</b> , you will submit the process to create the <b>Course Session Roster</b> for this session.  Click the <b>OK</b> button. <div>OK</div>

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**Course Session Roster**

Run Control ID: CSR01 [Report Manager](#) [Process Monitor](#) [Run](#)

Process Instance: 412

**Report Request Parameters:**

Course:  Time Management

AND

Session #:

OR

[Save](#) [Notify](#) [Add](#) [Update/Display](#)

Step	Action
16.	<p>Notice a process instance number is displayed. This number is used to identify the process.</p> <p>Use the <b>Process Monitor</b> link to retrieve the run status for the <b>Course Session Roster</b>.</p> <p>Click the <b>Process Monitor</b> link.</p> <p><a href="#">Process Monitor</a></p>
17.	<p>Use the <b>Process List</b> page to check the status of the process and verify that it is successfully completed</p>
18.	<p>Notice that the <b>Run Status</b> for the requested job should be <b>Success</b> and the <b>Distribution Status</b> should be <b>Posted</b>.</p> <p>You may need to click the <b>Refresh</b> button multiple times to achieve this result.</p>



Click the **Details** link in the **Details** column. **NOTE:** The last document you sent to process will appear at the top, if there are several entries listed on the page.

On the subsequent pages:

Click the **View Log/Trace** link.

Click the **PDF** document in the **File List**.

When the **Course Session Roster** appears on the screen, you can send it to the printer.

Step	Action
19.	You have successfully created a course session roster. <b>End of Procedure.</b>

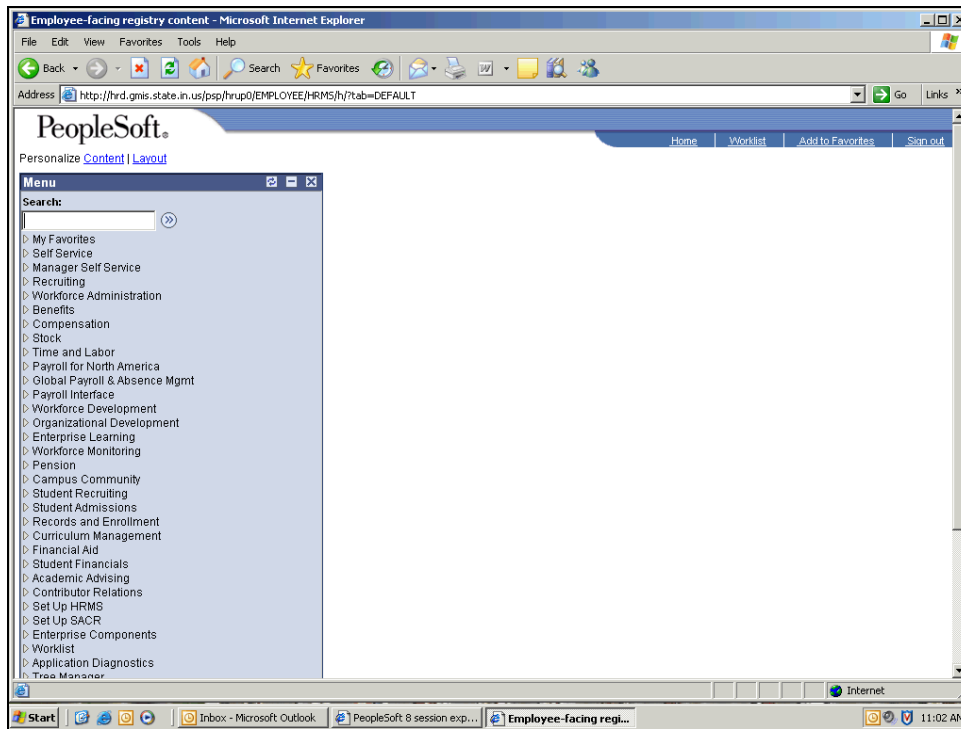
## Closing a Session

### Closing a Course Session

You can set up training sessions for the courses that are designated for internal administration. You specify the session duration, capacity, location, time, instructors, and cost on the **Course Session Profile** page. You can enter, update, or view session status, date, time, and capacity of a course session on this page.

In this topic, the PeopleTools 1 course session 0002 is complete. You need to close this session in PeopleSoft Human Resources.

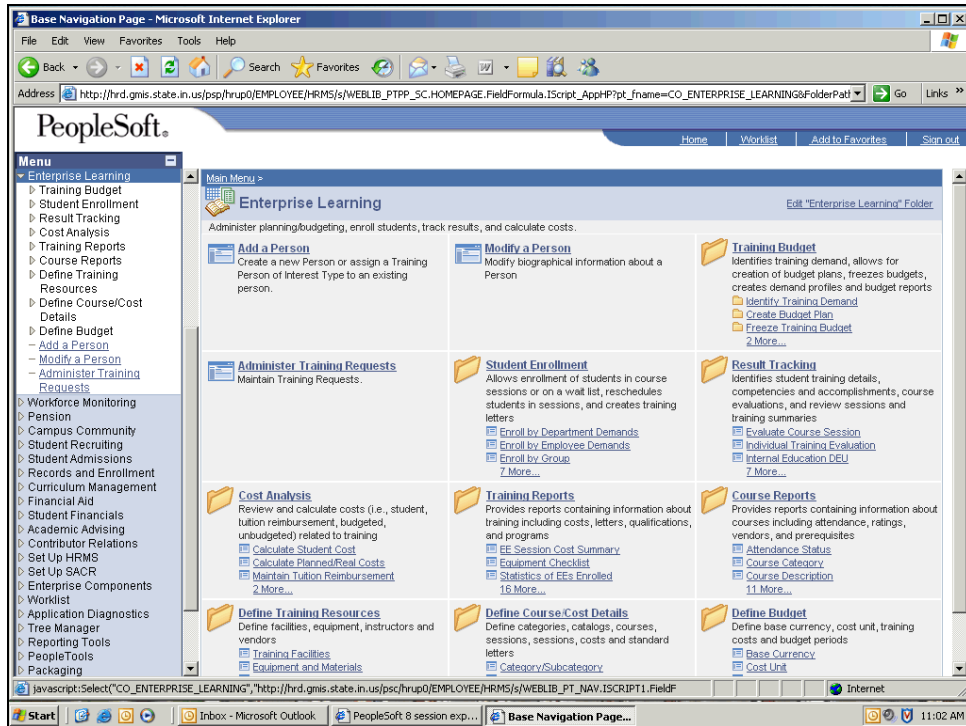
### Procedure




Step	Action
1.	<p>Begin by navigating to the <b>Course Session Profile</b> page.</p> <p>Click the <b>Enterprise Learning</b> link.</p> <p><a href="#">Enterprise Learning</a></p>

# Training Guide

## Enterprise Learning Test



Step	Action
2.	Click the <b>Define Course/Cost Details</b> button.
3.	Click the <b>Course Sessions</b> button. 

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[New Window](#) | [Help](#) | [PDF](#)

**Menu**

- Enterprise Learning
  - Training Facilities
  - Equipment and Materials
  - Instructors
  - Vendors
  - Vendor Contacts
  - Category/Subcategory
  - Catalog Costs
  - Courses
  - Course Costs
  - Course Session Planner
  - Course Sessions**
  - Course Session Costs
  - Catalog Organization
  - Program Information
  - Tuition Expense Type
  - Non-Course Training
  - Steps DEU
  - Plans DEU
  - 2483 Indicators FRA
  - 2483 Parameters FRA
  - Base Currency
  - Cost Unit
  - Trainees Salary Costs
  - Job Code Salary Costs
  - Budget Period
  - Department Budget
  - Department View
- Workforce Monitoring
- Pension
- Budgets
- HRMS Portal Pack
- System Administration
- Set Up SACR
- Enterprise Components
- Worklist
- Application Diagnostics
- Tree Manager
- Reporting Tools
- PeopleTools
- Packaging
- Careers
- Change My Password

**Course Sessions**

Enter any information you have and click Search. Leave fields blank for a list of all values.

[Find an Existing Value](#) | [Add a New Value](#)

Course Code:

Course Session Nbr:

Description:

Course Start Date:

Course End Date:

Session Status:

☐ Case Sensitive

[Search](#) [Clear](#) [Basic Search](#) [Save Search Criteria](#)

[Find an Existing Value](#) | [Add a New Value](#)

Step	Action
4.	Enter the desired information into the <b>Course Code</b> field. Example: " <b>K018</b> ".
5.	Click in the <b>Course Session Nbr</b> field. <input type="text"/>
6.	Enter the desired information into the <b>Course Session Nbr</b> field. Example: " <b>0002</b> ".
7.	Click the <b>Search</b> button. <input type="button" value="Search"/>
8.	Use the <b>Course Session Profile</b> page to enter, update, or view session status, dates, times, and student capacity.

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**Course Session Profile** | Location, Instructor | Equipment | Expense

Course: K018 PeopleTools 1 Course Status: Active

Session Number: 0002 School:

\*Session Status: **Active** ☐ Session Administration

Start/End Dates: 06/19/2000 to 06/23/2000 ☐ Rescheduled


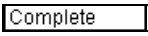
Start/End Times: 9:00AM 6:00PM

Duration: 5.0 Duration Unit: Day

Min Students/Session: 5 Max Students/Session: 15


Session Language: Vendor ID:

[Course Session Profile](#) | [Location, Instructor](#) | [Equipment](#) | [Expense](#)

Step	Action
9.	Use the <b>Session Status</b> field to specify the course status, such as Active, Canceled, or Complete. Click the <b>*Session Status</b> list. 
10.	Click an entry in the list. 



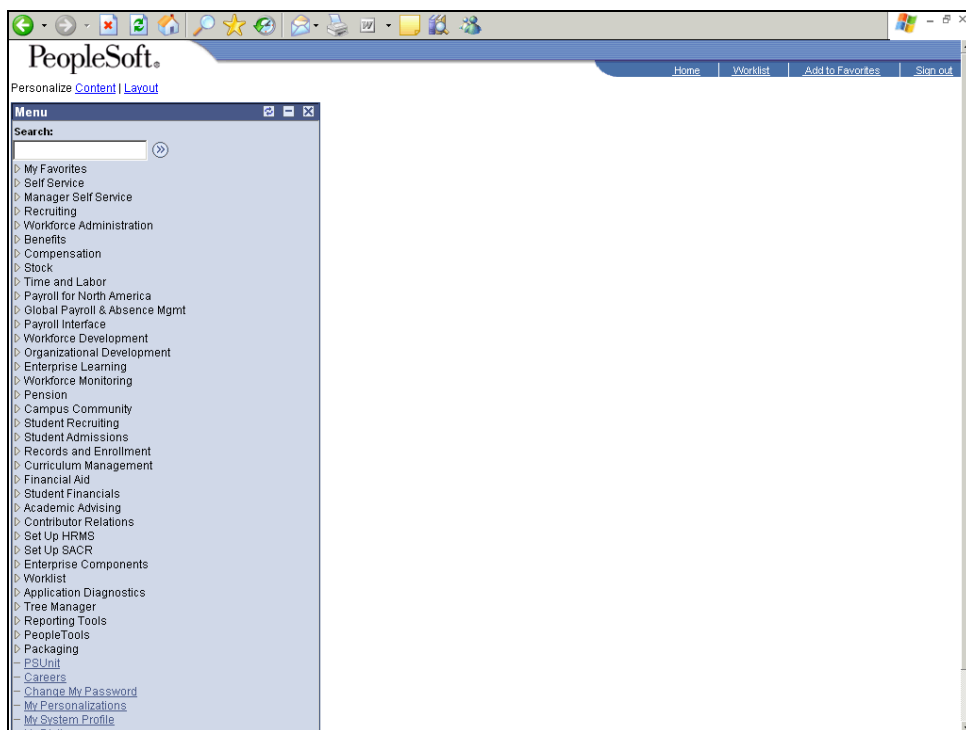
The screenshot shows the PeopleSoft Enterprise Learning interface. On the left is a navigation menu with options like Enterprise Learning, Training Facilities, Equipment and Materials, Instructors, Vendors, Vendor Contacts, Category/Subcategory, Catalog Costs, Courses, Course Costs, Course Session Planner, Course Sessions, Course Session Costs, Catalog Organization, Program Information, Tuition Expense Type, Non-Course Training, Steps DEU, Plans DEU, 2483 Indicators FRA, 2483 Parameters FRA, Base Currency, Cost Unit, Trainees Salary Costs, Job Code Salary Costs, Budget Period, Department Budget, Department View, Workforce Monitoring, Pension, Budgets, HRMS Portal Pack, System Administration, Set Up SACR, Enterprise Components, Worklist, Application Diagnostics, Tree Manager, Reporting Tools, PeopleTools, Packaging, Careers, and Change My Password. The main content area is titled 'Course Session Profile' and includes tabs for Location, Instructor, Equipment, and Expense. The form displays the following information: Course: K018, PeopleTools 1, Course Status: Active; Session Number: 0002, School: ; Session Status: Complete (dropdown), Session Administration (checked), Rescheduled (unchecked); Start/End Dates: 06/19/2000 to 06/23/2000; Start/End Times: 9:00AM to 6:00PM; Duration: 5.0, Duration Unit: Day; Min Students/Session: 5, Max Students/Session: 15; Session Language: ; Vendor ID: . At the bottom are buttons for Save, Return to Search, Notify, Add, and Update/Display. A breadcrumb trail at the bottom reads: Course Session Profile | Location, Instructor | Equipment | Expense.

Step	Action
11.	Click the <b>Save</b> button. 
12.	You have successfully closed a course session. <b>End of Procedure.</b>

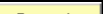
## Evaluate a Course Session

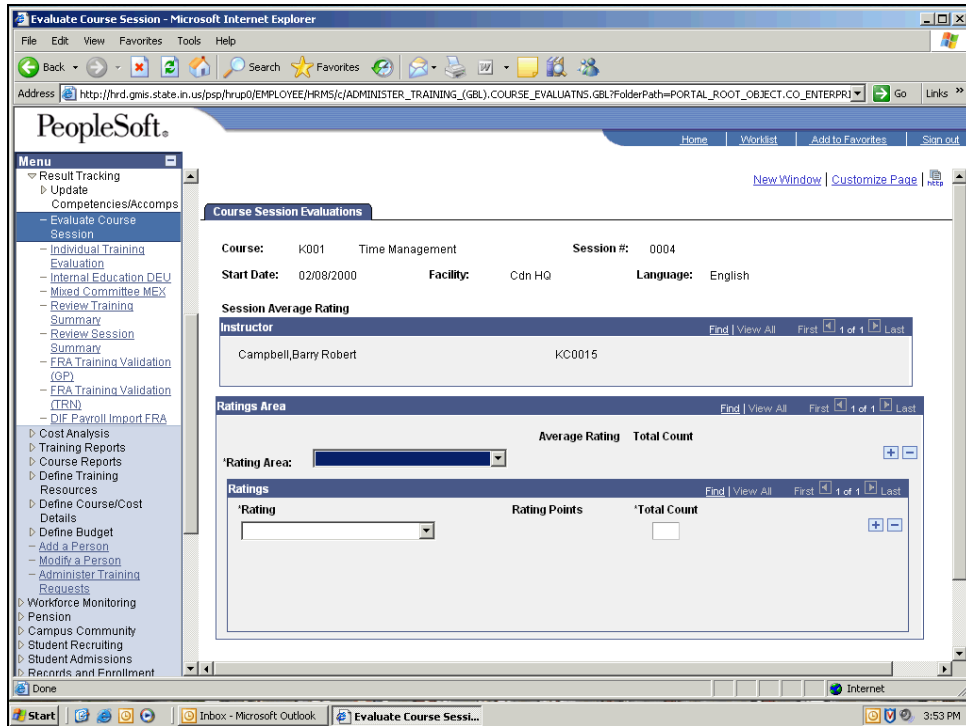
### Procedure


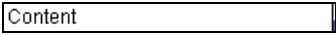

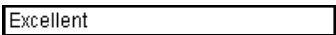

Use the [Evaluate Course Session](#) page to record student feedback on course sessions so that you know what areas need improvement. You can track course ratings for areas such as training facilities, instructors, course content, materials, and presentation. You can also review session statistics, including the number of responses per rating, average ratings, and the overall average for the session. Ratings can be entered only after you've marked the session **"Completed"**.





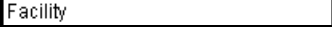

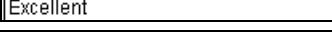


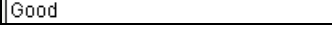



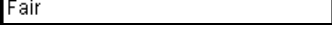



Step	Action
1.	Click the <a href="#">Enterprise Learning</a> link. <a href="#">Enterprise Learning</a>
2.	Click the <a href="#">Result Tracking</a> link. <a href="#">Result Tracking</a>
3.	Click the <a href="#">Evaluate Course Session</a> link.






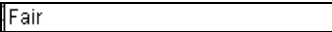

Step	Action
4.	Enter the desired information into the <b>Course Code</b> field. Example: " <b>K001</b> ".
5.	Enter the desired information into the <b>Course Session Nbr</b> field. Example: " <b>0004</b> ".
6.	Click the <b>Search (Alt+1)</b> button. 



Step	Action
7.	<p>In the <b>Ratings Area</b> you will need to follow the <b>Standard Rating Form</b> format and add rows of data to capture the correct information.</p> <p>The five areas are <b>Content, Facility, Instructors, Materials, and Presentation</b>.</p> <p><b>Important:</b> Always remember to click the Plus Sign (+) before entering the ratings for your next area.</p> <p>Click the <b>*Rating Area</b> list.</p> 
8.	<p>Click an entry in the list.</p> 
9.	<p>Click the <b>*Rating</b> list.</p> 
10.	<p>In the <b>Rating</b> field, select the appropriate rating: <b>Excellent, Good, Fair, or Poor</b>.</p> <p>Click an entry in the list.</p> 
11.	<p>In the <b>Total Count Field</b>, enter the number of students who selected the rating. The system computes the <b>Rating Points</b> assigned to each rating.</p> <p>Enter the desired information into the <b>*Total Count</b> field. Example: <b>"5"</b>.</p>
12.	<p>Click the <b>Add a new row at row 1 (Alt+7)</b> button.</p> 

Step	Action
13.	Click the <b>*Rating</b> list. 
14.	Click an entry in the list. 
15.	Enter the desired information into the <b>*Total Count</b> field. Example: " <b>2</b> ".
16.	Once we have completed all the students' ratings for <b>Content</b> , add a row to enter the next <b>Rating Area</b> .  <b>Important:</b> Don't forget to click the <b>Plus Sign (+)</b> before entering the next <b>Rating Area</b> .  Click the <b>Add a new row at row 1 (Alt+7)</b> button. 
17.	Click the <b>*Rating Area</b> list. 
18.	Click an entry in the list. 
19.	Click the <b>*Rating</b> list. 
20.	Click an entry in the list. 
21.	Enter the desired information into the <b>*Total Count</b> field. Example: " <b>4</b> ".
22.	Click the <b>Add a new row at row 1 (Alt+7)</b> button. 
23.	Click the <b>*Rating</b> list. 
24.	Click an entry in the list. 
25.	Enter the desired information into the <b>*Total Count</b> field. Example: " <b>2</b> ".
26.	Click the <b>Add a new row at row 1 (Alt+7)</b> button.  
27.	Click the <b>*Rating</b> list. 
28.	Click an entry in the list. 
29.	Enter the desired information into the <b>*Total Count</b> field. Example: " <b>1</b> ".
30.	Click the <b>Add a new row at row 1 (Alt+7)</b> button. 

Step	Action
31.	Click the <b>*Rating Area</b> list. 
32.	Click an entry in the list. 
33.	Click the <b>*Rating</b> list. 
34.	Click an entry in the list. 
35.	Enter the desired information into the <b>*Total Count</b> field. Example: "7".
36.	Click the <b>Add a new row at row 1 (Alt+7)</b> button. 
37.	Click the <b>*Rating Area</b> list. 
38.	Click an entry in the list. 
39.	Click the <b>*Rating</b> list. 
40.	Click an entry in the list. 
41.	Enter the desired information into the <b>*Total Count</b> field. Example: "6".
42.	Click the <b>Add a new row at row 1 (Alt+7)</b> button. 
43.	Click the <b>*Rating</b> list. 
44.	Click an entry in the list. 
45.	Enter the desired information into the <b>*Total Count</b> field. Example: "1".
46.	Click the <b>Add a new row at row 1 (Alt+7)</b> button. 
47.	Click the <b>*Rating Area</b> list. 
48.	Click an entry in the list. 
49.	Click the <b>*Rating</b> list. 
50.	Click an entry in the list. 
51.	Enter the desired information into the <b>*Total Count</b> field. Example: "5".

Step	Action
52.	Click the <b>Add a new row at row 1 (Alt+7)</b> button. 
53.	Click the <b>*Rating</b> list. 
54.	Click an entry in the list. 
55.	Enter the desired information into the <b>*Total Count</b> field. Example: " <b>1</b> ".
56.	Click the <b>Add a new row at row 1 (Alt+7)</b> button. 
57.	Click the <b>*Rating</b> list. 
58.	Click an entry in the list. 
59.	Enter the desired information into the <b>*Total Count</b> field. Example: " <b>1</b> ".
60.	Click the scrollbar.
61.	Once you have entered all the ratings save your information. After you click the save button the system will calculate the overall session rating average. Click the <b>Save (Alt+1)</b> button. 
62.	Click the scrollbar.
63.	Notice the <b>Session Average Rating</b> field has updated. You can also view individual <b>Rating Areas</b> by using the <b>Arrow</b> or <b>View All</b> keys located in the <b>Ratings Area</b> .
64.	<b>End of Procedure.</b>





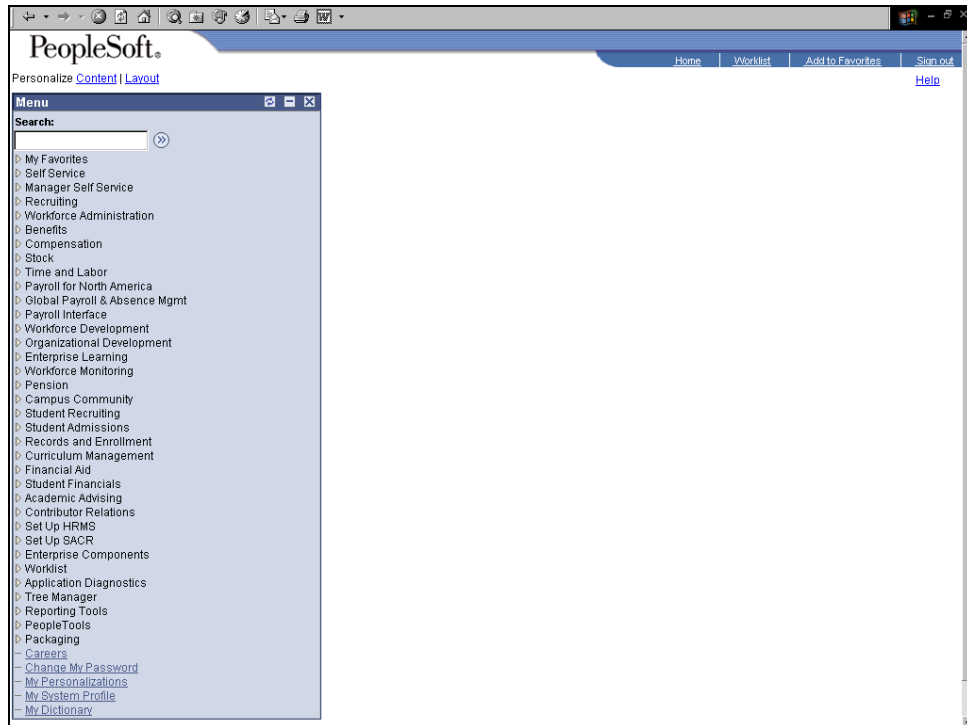
## Reviewing Training Records

### Viewing Student Training Summary

Use the **Review Training Summary** page to view the entire training history for an employee. This information may also be saved to a spreadsheet.

In this example, Martina Griffith's manager wants to know whether she has passed the Performance Management course, which can be done through the **Review Training Summary**.

### Procedure



Step	Action
1.	Begin by navigating to the <b>Student Training Summary</b> page. Click the <b>Enterprise Learning</b> link. <input type="text" value="Enterprise Learning"/>
2.	Click the <b>Result Tracking</b> link.
3.	Click the <b>Review Training Summary</b> link.

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Home Worklist Add to Favorites Sign out

New Window Help

**Menu**

- Result Tracking
  - Update
    - Competencies/Accomplishments
    - Evaluate Course Session
    - Individual Training Evaluation
    - Internal Education DEU
    - Mixed Committee MEK
  - Review Training Summary
    - Review Session Summary
- Cost Analysis
- Training Reports
- Course Reports
- Define Training Resources
- Define Course/Cost Details
- Define Budget
  - Add a Person
  - Modify a Person
  - Administer Training Requests
- Workforce Monitoring
- Pension
- Campus Community
- Student Recruiting
- Student Admissions
- Records and Enrollment
- Curriculum Management
- Financial Aid
- Student Financials
- Academic Advising
- Contributor Relations
- Set Up HRMS
- Set Up SACR
- Enterprise Components
- Worklist
- Application Diagnostics
- Tree Manager
- Reporting Tools
- PeopleTools
- Packaging

**Review Training Summary**

Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value

EmplID: begins with

Name: begins with


Last Name: begins with

Second Name: begins with

Alternate Character Name: begins with

☐ Case Sensitive

Search Clear Basic Search Save Search Criteria

Step	Action
4.	Enter the desired information into the <b>EmplID</b> field. Example: " <b>KC0001</b> ".
5.	Click the <b>Search</b> button. 
6.	Use the <b>Student Training Summary</b> page to view the summary of a student's training history.

PeopleSoft®

Home | Worklist | Add to Favorites | Sign out

[New Window](#) | [Help](#) | [Customize Page](#) | [Help](#)


**Student Training Summary**

Martina Griffiths **Person ID:** KC0001

**Training Summary** [Customize](#) | [Find](#) | [View All](#) | [First](#) | [1-2 of 2](#) | [Last](#)

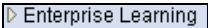

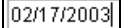
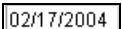

Course	Title	Session #	Start Date	End Date
K006	Conducting Performance Reviews	0002	06/23/2000	06/23/2000
K003	Performance Management	0001	05/03/1999	05/03/1999


[Return to Search](#) [Notify](#)

Step	Action
7.	Click the <b>Status</b> tab. 
8.	View a student's training history to determine whether the student has completed or passed a course.  Notice that Martina has completed the Performance Management course with grade <b>P</b> , indicating Passed.
9.	In summary, you view an employee's training summary information to identify the courses that the employee has taken. <b>End of Procedure.</b>




## Appendix


### Appendix A - Adding a Course Session

1.	Begin by navigating to the <b>Course Session Profile</b> page. Click the <b>Enterprise Learning</b> link. 
2.	Click the <b>Define Course/Cost Details</b> link.
3.	Click the <b>Course Sessions</b> link.
4.	Click the <b>Add a New Value</b> tab.
5.	Enter the desired information into the <b>Course Code</b> field. Enter a valid value e.g. <b>"BSK001"</b> .  If you do not know the course code, click on the magnifying glass to lookup the course codes.
6.	Click the <b>Add</b> button.  <b>IMPORTANT:</b> Leave the Course Session Number Blank.  The system will assign a sequential number when you save the record. 
7.	Use the <b>Course Session Profile</b> page to enter, update, or view a session status, date, time, and capacity.
8.	Specify the session status, such as Active, Canceled, or Complete in the <b>Session Status</b> field.  To create a new session, accept the default status of <b>Active</b> for the <b>Session Status</b> field.
9.	Enter the desired information into the <b>Start Date</b> field. Enter a valid value e.g. <b>"02/17/2003"</b> .
10.	Press <b>[Tab]</b> . 
11.	Enter the desired information into the <b>End Date</b> field. Enter a valid value e.g. <b>"02/17/2004"</b> .  ( <b>Note:</b> The fact that the class start/end dates are not the same year appears to be a typo in the tutorial.)
12.	Press <b>[Tab]</b> . 
13.	Enter the desired information into the <b>Start Time</b> field. Enter a valid value e.g. <b>"0800"</b> .
14.	Press <b>[Tab]</b> . 

15.	Enter the desired information into the <b>End Time</b> field. Enter a valid value e.g. " <b>1700</b> ".
16.	Click the <b>Location, Instructor</b> tab.
17.	Use the <b>Location, Instructor</b> page to enter, update, or view information regarding the course session at the training facility.
18.	Specify a training facility code for this session in the <b>Facility</b> field. Enter the desired information into the <b>Facility</b> field. Enter a valid value e.g. " <b>BZ001</b> ".
19.	Click the <b>Save</b> button. 
20.	Notice that the session number has changed from <b>0000</b> to <b>0001</b> . This indicates that a session has been added to the Presentation Skills course. It was automatically assigned a number. In this case <b>0001</b> .
21.	You have successfully added a session for the Presentation Skills course. <b>End of Procedure.</b>


## Appendix B - Adding an Instructor



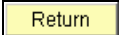
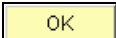




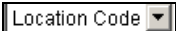
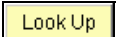

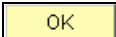
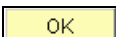
1.	Begin by navigating to the <b>Instructor Profile</b> page. Click the <b>Enterprise Learning</b> link. 
2.	Click the <b>Instructors</b> link under <b>Define Training Resources</b> . 
3.	Either <b>Find an Existing Value</b> (Person is already designated as an instructor in PeopleSoft), or <b>Add a New Value</b> (Designate a new person as an instructor.)  We will designate a new instructor. Click the <b>Add a New Value</b> tab.
4.	Enter the desired information into the <b>Instructor ID</b> field. Enter a valid value e.g. " <b>KR0028</b> ".
5.	Click the <b>Add</b> button. 
6.	Click the <b>Qualification</b> tab.
7.	Use the <b>Qualification</b> page to add, update, or display the courses that the instructor is qualified to teach.
8.	In the <b>Course Code</b> field, specify a course code from the list of courses that the instructor will teach. Enter the desired information into the <b>*Course Code</b> field. Enter a valid value e.g. " <b>K005</b> ".
9.	To list an additional course the instructor is qualified to teach, you would click the plus (+) key. This would give you another row, where you can add an additional <b>Course Code</b> .

10.	Click the <b>Save</b> button. 
11.	You have successfully added Luis Duarte as an instructor. <b>End of Procedure.</b>

## Appendix C - Add a Person (External Trainee)

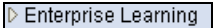

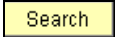

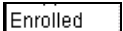

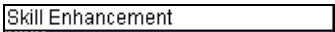
1.	Click the <b>Enterprise Learning</b> link. 
2.	Click the <b>Add a Person</b> button.
3.	Click the <b>Person of Interest Type</b> list. 
4.	Select "External Trainee." 
5.	Click the <b>Add the Person</b> button. 
6.	Click the <b>Add</b> button. 
7.	For the effective date, enter the first day this person began their working relationship with your agency. 
8.	Click the <b>*Format Type</b> list. 
9.	Select English in the drop down list. 
10.	Click the <b>Add Name</b> link. 
11.	Enter the desired information into the <b>First Name</b> field. Enter a valid value e.g. <b>"John"</b> .
12.	Enter the desired information into the <b>Last Name</b> field. Enter a valid value e.g. <b>"Student"</b> .
13.	Click the <b>OK</b> button. 
14.	Enter the desired information into the <b>Date of Birth</b> field. Enter a valid value e.g. <b>"010182"</b> .
15.	Leave gender as "Unknown" for External Trainee. 
16.	Click the <b>*Marital Status</b> list. 





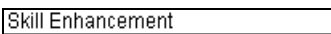

17.	Select "Unknown" for Marital Status for External Trainee.
18.	Click the <b>*National ID Type</b> list. 
19.	Select "Driver's License Number" for External Trainee. 
20.	Enter the desired information into the <b>National ID</b> field. Enter a valid value e.g. " <b>2156-89-6532</b> ".
21.	Click the <b>Contact Information</b> tab. 
22.	Click the <b>Add Address Detail</b> link. 
23.	Click the <b>Add Address</b> link. 
24.	Enter the desired information into the <b>Address 1</b> field. Enter a valid value e.g. " <b>123 Student Blvd</b> ".
25.	Enter the desired information into the <b>City</b> field. Enter a valid value e.g. " <b>Indianapolis</b> ".
26.	Enter the desired information into the <b>State</b> field. Enter a valid value e.g. " <b>IN</b> ".
27.	Press <b>[Tab]</b> .
28.	Enter the desired information into the <b>Postal</b> field. Enter a valid value e.g. " <b>46215</b> ".
29.	Enter the desired information into the <b>County</b> field. Enter a valid value e.g. " <b>Marion</b> ".
30.	Click the <b>OK</b> button. 
31.	Click the <b>OK</b> button. 
32.	Choose a <b>Phone Type</b> in the drop down list. 
33.	Enter the desired information into the <b>Telephone</b> field. Enter a valid value e.g. " <b>3178653265</b> ".
34.	Press <b>[Tab]</b> .
35.	Click the <b>Preferred</b> option. 
36.	Choose an <b>Email Type</b> from the drop down list. 
37.	Enter the desired information into the <b>*Email Address</b> field. Enter a valid value e.g. " <b>jstudent@myhome.com</b> ".
38.	Click the <b>Preferred</b> option. 

39.	Click the <b>Organizational Relationships</b> tab. 
40.	Click the <b>Add the Relationship</b> button. 
41.	Click the <b>Return</b> button. This screen will display all values matched by first name, last name, and National ID number. This search is utilized to determine if the person being added already has a record in the PeopleSoft system. If there is a match for the person being added, click "Carry ID" to utilize the PeopleSoft ID number already assigned to this person. If no match exists, click on Return. If no match exists. when you click on Return a PeopleSoft Empl ID# will be assigned automatically by the system. 
42.	Click the <b>OK</b> button. 
43.	Under Security Access Type, choose <b>Business Unit</b> . 
44.	Enter the Business Unit into the <b>Value 1</b> field. Enter a valid value e.g. " <b>00070</b> ".
45.	Press <b>[Tab]</b> .
46.	Click the <b>Add a new row at row 1 (Alt+7)</b> button. 
47.	In the newly added row under Security Access Type, choose <b>Location</b> . 
48.	Press <b>[Tab]</b> .
49.	Click the <b>Look up Value 2 (Alt+5)</b> button. 
50.	Choose <b>Description</b> from the drop down list. 
51.	Enter the desired information into the <b>begins with</b> field. Enter a valid value e.g. " <b>state</b> ".
52.	Click the <b>Look Up</b> button. 
53.	Choose <b>State Personnel Department</b> from the Search Results list. 
54.	Click the <b>OK</b> button. 
55.	Click the <b>OK</b> button. 
56.	<b>End of Procedure.</b>



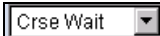
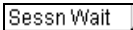


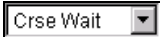
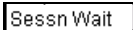



## Appendix D - Enrolling Students Individually

1.	<p>Begin by navigating to the <b>Course Session Enrollment</b> page.</p> <p>Click the <b>Enterprise Learning</b> link.</p> <p></p>
2.	Click the <b>Student Enrollment</b> link.
3.	Click the <b>Enroll Individually</b> link.
4.	<p>Enter the desired information into the <b>Course Code</b> field. Enter a valid value e.g. "<b>BSK001</b>".</p>
5.	<p>Click in the <b>Course Session Nbr</b> field.</p> <p></p>
6.	<p>Enter the desired information into the <b>Course Session Nbr</b> field. Enter a valid value e.g. "<b>0001</b>".</p>
7.	<p>Click the <b>Search</b> button.</p> <p></p>
8.	<p>Use the <b>Course Session Enrollment</b> page to enroll students.</p> <p><b>CAUTION:</b> As you select each student for enrollment, always double-check the Business Unit field and verify that it is the correct employee. Name searches sometimes display more than one individual with the same name.</p>
9.	<p>Enter the desired information into the <b>EmplID</b> field. Enter a valid value e.g. "<b>KR0040</b>".</p>
10.	<p>Specify the student enrollment status, such as Enrolled or Sessn Wait in the <b>Enrollment/Attendance</b> field.</p> <p>Click the <b>*Enrollment/Attendance</b> list.</p> <p></p>
11.	<p>Select <b>Enrolled</b>.</p> <p></p>
12.	<p>The <b>Status Date</b> field uses the current system date by default. Accept the default date for this field.</p>
13.	<p>Specify the reason for training in the <b>Training Reason</b> field.</p> <p>Click the <b>Training Reason</b> list.</p> <p></p>
14.	<p>Click an entry in the list.</p> <p>Always select <b>Skill Enhancement</b>.</p> <p></p>
15.	<p>Leave the <b>Prerequisites Met</b> option turned off. After you have finished all enrollments, you may use <b>Prerequisite Checking</b> (above) to verify that your students' course requirements have been met.</p> <p>Prerequisites, if used, would need to be set up when the Course is entered into the system.</p>

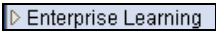

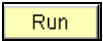
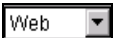
16.	<p>You may use the <b>Prerequisite Checking</b> button to search the Student Training records listed on the <b>Session Enrollment</b> page and determine if each student has completed and passed the prerequisite courses.</p> <p>If so, PeopleSoft populates the <b>Prerequisites Met</b> check box for each student who meets the criteria. If a student is lacking the necessary courses, a process for notifying students of discrepancies may be developed. Also, any enrolled status existing for students who do not meet the prerequisites may be manually changed.</p>
17.	<p>Use the <b>Letter Code</b> field to generate a form letter. The letter code defaults to CON, indicating Confirmed. For this exercise, accept the default letter code value.</p> <p><b>IMPORTANT!!</b> The system does not currently support the generation of letters. At this time, you must have an alternative method of notifying students.</p>
18.	<p>We will now add another student.</p> <p>Click the <b>Add Row</b> button.</p> 
19.	<p>Enter the desired information into the <b>EmplID</b> field. Enter a valid value e.g. "<b>KR0041</b>".</p>
20.	<p>Click the <b>*Enrollment/Attendance</b> list.</p> 
21.	<p>Click an entry in the list.</p> <p>Select <b>Enrolled</b>.</p> 
22.	<p>Click the <b>Training Reason</b> list.</p> 
23.	<p>Click an entry in the list.</p> <p>Select <b>Skill Enhancement</b>.</p> 
24.	<p>You have enrolled two employees in Presentation Skills course session 0001. If you enroll more than the maximum number of employees allowed in the session, the PeopleSoft application issues a warning message when you save the page.</p>
25.	<p>Your enrollment(s) are completed.</p> <p>Click the <b>Save</b> button.</p> 
26.	<p>You have successfully enrolled individual students into a course session.</p> <p><b>End of Procedure.</b></p>

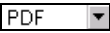
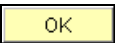

## Appendix E - Creating a Wait List

1.	Begin by navigating to the <b>Course Wait List</b> page. Click the <b>Enterprise Learning</b> link. 
2.	Click the <b>Student Enrollment</b> link.
3.	Click the <b>Create/Update Course Wait List</b> link.
4.	Enter the desired information into the <b>Course Code</b> field. Enter a valid value e.g. " <b>K005</b> ".
5.	Click the <b>Search</b> button. 
6.	Use the <b>Course Wait List</b> page to add employees and non-employees to wait lists and assign the enrollment status. For this exercise, add two employees to the wait list. To add them to the wait list, specify their IDs in the <b>EmplID</b> field.
7.	Enter the desired information into the <b>EmplID</b> field. Enter a valid value e.g. " <b>KU0097</b> ".
8.	Assign a wait list status to the employee in the <b>Attendance</b> field. The PeopleSoft application provides a course wait list and a session wait list. Use both of these statuses in the processing logic when enrolling students from a wait list to a session. Click the <b>*Attendance</b> list. 
9.	Click an entry in the list. 
10.	The system populates a letter code from the <b>Standard Letter</b> table according to the student's wait list status. The system also populates the wait list date based on the current date. The PeopleSoft application uses this date to enroll students from the oldest date to the most recent date. You can override this date if the student requested for enrollment in the course on a different date.  For this example, accept the default wait list date in the <b>Waitlst Dt</b> field.
11.	Click in the <b>Session #</b> field. 
12.	If you assign a session wait list status to a student, specify the session number from the list of Active sessions in the <b>Session #</b> field. Enter the desired information into the <b>Session #</b> field. Enter a valid value e.g. " <b>0072</b> ".
13.	Click the <b>Add Row</b> button. 
14.	Enter the desired information into the <b>EmplID</b> field. Enter a valid value e.g. " <b>KU0098</b> ".
15.	Click the <b>*Attendance</b> list. 
16.	Click an entry in the list. 

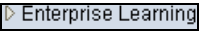

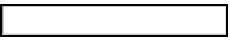
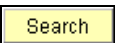
17.	Click in the <b>Session #</b> field. <input type="text"/>
18.	Enter the desired information into the <b>Session #</b> field. Enter a valid value e.g. " <b>0072</b> ".
19.	Click the <b>Save</b> button. 
20.	You have successfully created a wait list. <b>End of Procedure.</b>


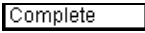

## Appendix F - Creating a Course Session Roster

1.	Begin by navigating to the <b>Course Session Roster</b> page. Click the <b>Enterprise Learning</b> link. 
2.	Click the <b>Course Reports</b> link.
3.	Click the <b>Course Session Roster</b> link.
4.	You will need to <b>Find an Existing</b> or <b>Add a New Value</b> for <b>Run Control ID</b> .  We are going to <b>Add a New Value</b> .
5.	Enter the desired information into the <b>Run Control ID</b> field. Enter a valid value e.g. " <b>CSR01</b> ".
6.	Click the <b>Add</b> button. 
7.	Use the <b>Course Session Roster</b> page to define report parameters such as the course name, session number, and session start date.
8.	Enter your <b>Course</b> number.  Enter a valid value e.g. " <b>K001</b> ".
9.	Click in the <b>Session #</b> field. <input type="text"/>
10.	In the <b>Session #</b> field, specify the course session number for which you want to run the report. Alternatively, specify the beginning date of the course in the <b>Course Start Date</b> field.  Enter <b>Session #</b> a valid value e.g. " <b>0001</b> ".
11.	Click the <b>Run</b> button. 
12.	Use the <b>Process Scheduler Request</b> page to specify the parameters that are used when running the report.
13.	Select <b>Web</b> from the <b>Type</b> list. 



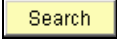



14.	Select format <b>PDF</b> . 
15.	By clicking <b>OK</b> , you will submit the process to create the <b>Course Session Roster</b> for this session.  Click the <b>OK</b> button. 
16.	Notice a process instance number is displayed. This number is used to identify the process.  Use the <b>Process Monitor</b> link to retrieve the run status for the <b>Course Session Roster</b> .  Click the <b>Process Monitor</b> link. 
17.	Use the <b>Process List</b> page to check the status of the process and verify that it is successfully completed
18.	Notice that the <b>Run Status</b> for the requested job should be <b>Success</b> and the <b>Distribution Status</b> should be <b>Posted</b> .  You may need to click the <b>Refresh</b> button multiple times to achieve this result.
19.	You have successfully created a course session roster. <b>End of Procedure.</b>

## Appendix G - Closing a Course Session

1.	Begin by navigating to the <b>Course Session Profile</b> page. Click the <b>Enterprise Learning</b> link. 
2.	Click the <b>Define Course/Cost Details</b> button.
3.	Click the <b>Course Sessions</b> button. 
4.	Enter the desired information into the <b>Course Code</b> field. Enter a valid value e.g. " <b>K018</b> ".
5.	Click in the <b>Course Session Nbr</b> field. 
6.	Enter the desired information into the <b>Course Session Nbr</b> field. Enter a valid value e.g. " <b>0002</b> ".
7.	Click the <b>Search</b> button. 

8.	Use the <b>Course Session Profile</b> page to enter, update, or view session status, dates, times, and student capacity.
9.	Use the <b>Session Status</b> field to specify the course status, such as Active, Canceled, or Complete. Click the <b>*Session Status</b> list. 
10.	Click an entry in the list. 
11.	Click the <b>Save</b> button. 
12.	You have successfully closed a course session. <b>End of Procedure.</b>




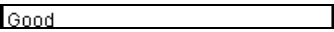


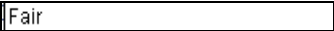

## Appendix H - Evaluate a Course Session

1.	Click the <b>Enterprise Learning</b> link. 
2.	Click the <b>Result Tracking</b> link. 
3.	Click the <b>Evaluate Course Session</b> link.
4.	Enter the desired information into the <b>Course Code</b> field. Enter a valid value e.g. <b>"K001"</b> .
5.	Enter the desired information into the <b>Course Session Nbr</b> field. Enter a valid value e.g. <b>"0004"</b> .
6.	Click the <b>Search (Alt+1)</b> button. 
7.	In the <b>Ratings Area</b> you will need to follow the <b>Standard Rating Form</b> format and add rows of data to capture the correct information.  The five areas are <b>Content, Facility, Instructors, Materials, and Presentation</b> .  <b>Important:</b> Always remember to click the Plus Sign (+) before entering the ratings for your next area. Click the <b>*Rating Area</b> list. 
8.	Click an entry in the list. 
9.	Click the <b>*Rating</b> list. 


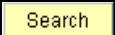
10.	In the <b>Rating</b> field, select the appropriate rating: <b>Excellent, Good, Fair, or Poor</b> . Click an entry in the list. 
11.	In the <b>Total Count Field</b> , enter the number of students who selected the rating. The system computes the <b>Rating Points</b> assigned to each rating. Enter the desired information into the <b>*Total Count</b> field. Enter a valid value e.g. <b>"5"</b> .
12.	Click the <b>Add a new row at row 1 (Alt+7)</b> button. 
13.	Click the <b>*Rating</b> list. 
14.	Click an entry in the list. 
15.	Enter the desired information into the <b>*Total Count</b> field. Enter a valid value e.g. <b>"2"</b> .
16.	Once we have completed all the students' ratings for <b>Content</b> , add a row to enter the next <b>Rating Area</b> .  <b>Important:</b> Don't forget to click the <b>Plus Sign (+)</b> before entering the next <b>Rating Area</b> .  Click the <b>Add a new row at row 1 (Alt+7)</b> button. 
17.	Click the <b>*Rating Area</b> list. 
18.	Click an entry in the list. 
19.	Click the <b>*Rating</b> list. 
20.	Click an entry in the list. 
21.	Enter the desired information into the <b>*Total Count</b> field. Enter a valid value e.g. <b>"4"</b> .
22.	Click the <b>Add a new row at row 1 (Alt+7)</b> button. 
23.	Click the <b>*Rating</b> list. 
24.	Click an entry in the list. 
25.	Enter the desired information into the <b>*Total Count</b> field. Enter a valid value e.g. <b>"2"</b> .
26.	Click the <b>Add a new row at row 1 (Alt+7)</b> button.  
27.	Click the <b>*Rating</b> list. 


28.	Click an entry in the list. 
29.	Enter the desired information into the <b>*Total Count</b> field. Enter a valid value e.g. "1".
30.	Click the <b>Add a new row at row 1 (Alt+7)</b> button. 
31.	Click the <b>*Rating Area</b> list. 
32.	Click an entry in the list. 
33.	Click the <b>*Rating</b> list. 
34.	Click an entry in the list. 
35.	Enter the desired information into the <b>*Total Count</b> field. Enter a valid value e.g. "7".
36.	Click the <b>Add a new row at row 1 (Alt+7)</b> button. 
37.	Click the <b>*Rating Area</b> list. 
38.	Click an entry in the list. 
39.	Click the <b>*Rating</b> list. 
40.	Click an entry in the list. 
41.	Enter the desired information into the <b>*Total Count</b> field. Enter a valid value e.g. "6".
42.	Click the <b>Add a new row at row 1 (Alt+7)</b> button. 
43.	Click the <b>*Rating</b> list. 
44.	Click an entry in the list. 
45.	Enter the desired information into the <b>*Total Count</b> field. Enter a valid value e.g. "1".
46.	Click the <b>Add a new row at row 1 (Alt+7)</b> button. 
47.	Click the <b>*Rating Area</b> list. 
48.	Click an entry in the list. 
49.	Click the <b>*Rating</b> list. 



50.	Click an entry in the list. 
51.	Enter the desired information into the <b>*Total Count</b> field. Enter a valid value e.g. " <b>5</b> ".
52.	Click the <b>Add a new row at row 1 (Alt+7)</b> button. 
53.	Click the <b>*Rating</b> list. 
54.	Click an entry in the list. 
55.	Enter the desired information into the <b>*Total Count</b> field. Enter a valid value e.g. " <b>1</b> ".
56.	Click the <b>Add a new row at row 1 (Alt+7)</b> button. 
57.	Click the <b>*Rating</b> list. 
58.	Click an entry in the list. 
59.	Enter the desired information into the <b>*Total Count</b> field. Enter a valid value e.g. " <b>1</b> ".
60.	Click the scrollbar.
61.	Once you have entered all the ratings save your information. After you click the save button the system will calculate the overall session rating average. Click the <b>Save (Alt+1)</b> button. 
62.	Click the scrollbar.
63.	Notice the <b>Session Average Rating</b> field has updated. You can also view individual <b>Rating Areas</b> by using the <b>Arrow</b> or <b>View All</b> keys located in the <b>Ratings Area</b> .
64.	<b>End of Procedure.</b>

## Appendix I - Viewing Student Training Summary

1.	Begin by navigating to the <b>Student Training Summary</b> page. Click the <b>Enterprise Learning</b> link. 
2.	Click the <b>Result Tracking</b> link.
3.	Click the <b>Review Training Summary</b> link.
4.	Enter the desired information into the <b>EmplID</b> field. Enter a valid value e.g. " <b>KC0001</b> ".
5.	Click the <b>Search</b> button. 

6.	Use the <b>Student Training Summary</b> page to view the summary of a student's training history.
7.	Click the <b>Status</b> tab. 
8.	View a student's training history to determine whether the student has completed or passed a course.  Notice that Martina has completed the Performance Management course with grade <b>P</b> , indicating Passed.
9.	In summary, you view an employee's training summary information to identify the courses that the employee has taken. <b>End of Procedure.</b>